



Performance Evaluations

—monitoring organizational health

Part 1

Global Health International
September 21, 2025
Presenter: Lowell C Cooper

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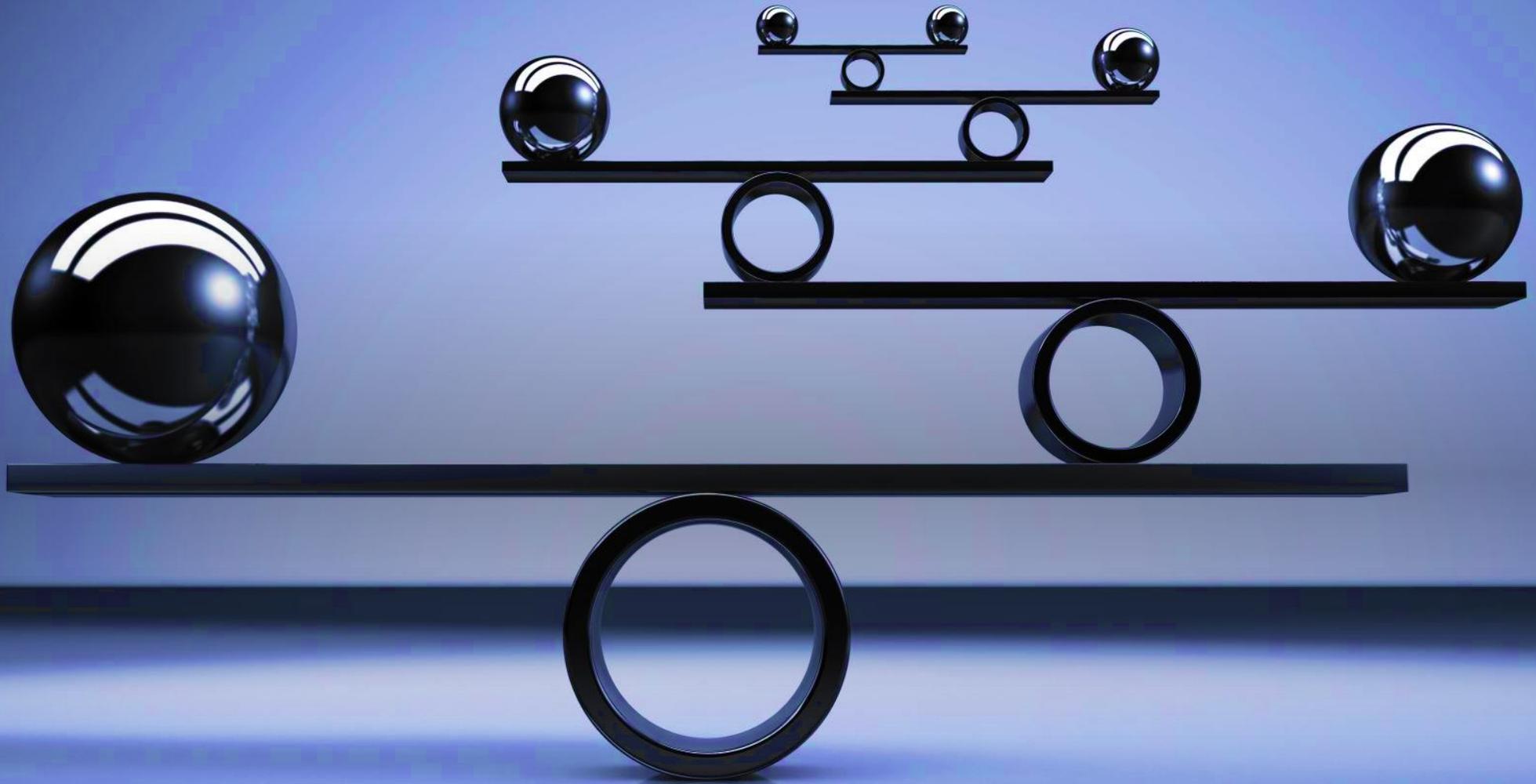
Objectives:

At the end of this session participants will:

1. Know the value of systematic performance evaluations in the pursuit of excellence.
2. Understand what to evaluate and how.
3. Have access to various editable evaluation survey templates.
4. Realize how to use evaluation and assessment survey results in planning for organizational progress.

Evaluating and improving operational efficiency and performance is crucial for organizations to enable them to reduce costs, enhance productivity, and deliver better value to customers.

Operational efficiency, quality, and performance is an ongoing process.



A blue-tinted image of a daisy flower with a quote overlaid. The quote is in white text with a slight shadow effect. The background is a solid blue color with a faint, larger daisy flower visible behind the text.

Perfection is not
attainable, but if we
chase perfection we
can catch excellence.

Vince Lombardi

Effective evaluations involve:

1. Focus on, and action towards, improvement.
2. Data-driven conclusions.
3. Stakeholder involvement.
4. Use of standardized tools and metrics.
5. Critical/analytical thinking skills.

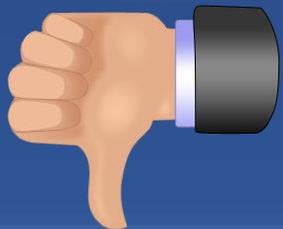
Value of performance review templates:

1. Enables consistency of information over time.
2. Facilitates progress tracking.
3. Encourages structured thinking and communication.
4. Enhances efficiency in HR functions.

Evaluation pros and cons:



- Structured method for performance feedback
- Helps set priorities for professional development
- Encourage, engage, and develop talent pool
- Creates documentation of performance over time
- Can improve job performance and motivation



- Time consuming
- Potential for recency bias
- Can create resistance, stress, insecurity
- Lacks uniform standards
- Reluctance to share critical incidents

Scope of this presentation:

1. Governance (Board performance)
2. Trustee evaluation
3. Board meeting evaluation
4. Executive evaluation
5. Management evaluation
6. Professional staff evaluation
7. Employee engagement survey
8. Client satisfaction survey
9. Programs and operational assessment
10. Mission fulfillment



November
2025 Session

Evaluations/Assessment Scope:

1. Governance (Board performance)
 2. Board meeting evaluation
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What is governance?

Governance is an ongoing process that creates:

- ✓ the system by which an organization is controlled
- ✓ the policies under which it operates
- ✓ the mechanisms by which it, and its people, are evaluated and held to account.

Governance decisions must be ethical, compliant with law and/or regulations, protective of assets (e.g., risk management), and supportive of organizational mission .

Board governance—self-evaluation:

“The purpose of engaging in a self-assessment process is to give the board an opportunity to reflect on how well it is fulfilling its responsibilities and to identify opportunities for continuous improvement.”

—Elements of Governance: Board Self-Assessment, A Core Responsibility, The Governance Institute



Board governance—self-evaluation:

Evaluation by board members of how the board fulfills its governance responsibilities:

- Board composition (size, skills, representation)
- Frequency of meetings
- Board member engagement
- Mission-referenced decision-making
- Process for strategic planning
- Leadership evaluation and succession planning
- Financial support/oversight and risk management
- Monitoring of institutional operations/trends/development

Future-ready indicators:

- Awareness of changes on the horizon that may pose threats or opportunities.
- Analysis of the strategic implications of such changes.
- Adaptation, proactively, to thrive in the future environment

Governing Boards Self-Assessment Questionnaire

Name of institution _____

Date: _____

Circle the most appropriate response using the following scoring definitions:
N = No knowledge/not applicable, 1 = Poor, 2 = Fair, 3 = Good, 4 = Very Good, 5 = Distinctive

Core Governance Responsibilities and Indicators	Practices typical of "Distinctive" rating	Trustee/Advisor Evaluation
1. Shaping mission and strategic direction	Board members have a common understanding of the organization's mission and vision. Mission and vision are used in policy and strategy decisions. The denominational identity and spiritual mission of the organization are kept in high profile, and the success of the organization is evaluated against these.	N 1 2 3 4 5
2. Strategic planning and policy decisions.	Board has established a process for strategic planning, and the board has quality engagement in the process.	N 1 2 3 4 5
3. Select, evaluate and develop executive leadership.	The Board has a leadership succession plan. The Board follows a regular executive evaluation system. The Board follows systematic search processes to fill vacancies in top leadership positions.	N 1 2 3 4 5
4. Ensure adequate financial resources.	The Board knows the long-range financial needs of the institution. Board members individually support the institution.	N 1 2 3 4 5
5. Provide expertise, access and influence to support organizational objectives.	Board membership has broad range of expertise and is thus capable of addressing most needs. Board members proactively engaged and effective in achieving access and influence goals.	N 1 2 3 4 5
6. Protect and enhance reputation of the organization.	Board members are effective ambassadors, proactive in building awareness and goodwill for organization.	N 1 2 3 4 5
7. Oversee financial performance and ensure risk management.	Board is active in preparing/reviewing multi-year financial plan. Board monitors financial statements regularly; ensures timely, independent audit of financial results and internal controls; understands compliance issues with various regulatory bodies. Organization maintains compliance and receives maximum period of accreditation.	N 1 2 3 4 5
8. Monitor performance and ensure accountability.	Board routinely monitors and evaluates performance, using the results to inform the strategic plan, resource allocation, and evaluation of officers. Where possible the performance is compared to comparable institutions.	N 1 2 3 4 5
9. Improve board performance.	Board evaluates its performance regularly (annually) and uses the information to develop plans to improve board effectiveness. Current board size is appropriate for governance. Formal process for identifying/recruiting directors. Board committees function effectively. Healthy atmosphere for effective discussion and efficient use of time. Directors feel involved and that their contributions are needed and valued. Annual calendar of board meetings known well in advance. Quality background materials sent in advance. Directors arrive well prepared for meetings. Minutes are circulated in a timely manner.	N 1 2 3 4 5

Comments about any aspect of governance or board performance are welcome.

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Trustee Evaluation of Board Performance

This survey asks your opinion regarding the Board's performance on 10 core governance responsibilities plus one question about your personal experience as a trustee. Select the response of your choice by checking the appropriate check box. Comments may be added in the comment box provided following each question.

Core Governance Responsibilities

1. Evaluate Board performance in shaping mission and strategic direction. Factors to consider include: the extent to which Board members have a common understanding of the organization's mission and vision; the extent to which mission and vision are used in policy and strategy decisions; and the extent to which the denominational identity and spiritual mission of the organization are kept in high profile and the success of the organization is evaluated against these.

Don't know	Very inadequate	Inadequate	Adequate	Good	Not applicable
<input type="checkbox"/>					

2. Evaluate the Board's performance in establishing a process for strategic planning and for having quality engagement of board members in that process.

Don't know	Very inadequate	Inadequate	Adequate	Good	Not applicable
<input type="checkbox"/>					

3. Evaluate the Board's performance regarding leadership succession planning. Factors to consider include: having a regular executive evaluation system; using systematic search processes to fill vacancies in top leadership positions; identifying and mentoring individuals with potential leadership talent for the organization.

Don't know	Very inadequate	Inadequate	Adequate	Good	Not applicable
<input type="checkbox"/>					

4. Evaluate Board performance in knowing the long-range financial needs of the institution and in individually supporting the institution.

Don't know	Very inadequate	Inadequate	Adequate	Good	Not applicable
<input type="checkbox"/>					

5. Evaluate Board performance with respect to Board composition. Factors to consider include: an appropriate range of expertise, diversity, and constituency representation; effective engagement of trustees in support of organizational objectives.

Don't know	Very inadequate	Inadequate	Adequate	Good	Not applicable
<input type="checkbox"/>					

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Board meeting—self-evaluation:

- In era of accountability, must show continual improvement
- Value in conducting annually—issues addressed readily
- Should identify:
 - Areas of excellence
 - Areas for more discussion
 - Top areas to address for improvement
 - Follow-up action plan developed
 - Set goals for coming year
 - Decide who is responsible for each and determine time frame for achievement
 - Monitor progress

Board meeting—self-evaluation:

- Excellence in governance does not happen automatically! It requires on-going education, assessment, and improvement.
- Periodic (recommended annually, but not less than once every two years) Board self-evaluation serves as internal feedback on Board performance.

Board meeting—self-evaluation:

- Adequate time for meetings
- Effective board committees
- Timely access to information
- Effective board meeting leadership
- Culture of board room (safe to talk/discuss/challenge)
- Management of 'conflicts of interest', confidentiality
- Adequacy and timeliness of minutes
- Trustee education
- Personal experience as a trustee

Board Meeting Assessment Tool

Name of institution: _____

Date: _____

Indicate with a checkmark (✓) your evaluation of this Board meeting using a scale of 1 through 5 where 1 = "unsatisfactory" and 5 = "excellent".

1. **Physical arrangements:** Seating and room space accommodations are comfortable; table space for documents/materials review; lighting and sound systems adequate; no ambient noise; room temperature appropriate; access to restrooms, etc.

My assessment: __ 1 __ 2 __ 3 __ 4 __ 5

Observations: _____

2. **Agenda and materials:** Agenda and appropriate materials received in advance; draft minutes for approval; access to archived documents; reports concise and informative; agenda reflects governance focus; ready access to governance document, etc.

My assessment: __ 1 __ 2 __ 3 __ 4 __ 5

Observations: _____

3. **Role of Chairperson:** Effective meeting management; engagement of all members; maintains meeting decorum; conflicts of interest managed; agenda management optimized; facilitates, not dominates, good group discussion and decision-making; etc.

My assessment: __ 1 __ 2 __ 3 __ 4 __ 5

Observations: _____

4. **Boardroom culture:** Safe to talk; absence of groupthink; respectful dialog; room for thoughtful dissent; conflicts of interest managed; adequate information for decision-making; regard for rules of order; respect for majority vote as 'group decision'; efficient use of time; etc.

My assessment: __ 1 __ 2 __ 3 __ 4 __ 5

Observations: _____

5. **Governance expertise and focus:** The Board understands and respects the boundary between governance and management; the full range of governance responsibilities is addressed; Board expertise is appropriate for the institution; etc.

My assessment: __ 1 __ 2 __ 3 __ 4 __ 5

Observations: _____

6. **My role in the Board meeting:** My presence makes a difference; my contributions to discussion are valued; I feel my time is well-spent; I am excited about the mission and future of this institution; I willingly invest time and energy for the institution between Board meetings; etc.

My assessment: __ 1 __ 2 __ 3 __ 4 __ 5

Observations: _____

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Director/trustee self-evaluation:

The purpose here is to obtain feedback from trustees regarding their experience on the board. Areas of inquiry would include:

- Alignment with the organization's mission
- Understanding of the organization's business/operations
- Trustee's sense of 'fit' on the board
- Trustee's ability to commit sufficient time/attention
- Trustee's engagement, not just presence at meetings
- Trustee's satisfaction with serving on the board

Director/Trustee Self-Evaluation Checklist

The following self-evaluation checklist will assist the Board in understanding and working to improve director/trustee experience. Please assign a numerical score reflecting your thoughts on each of the statements below.

Place a checkmark after the number that best represents your assessment for each of the following factors where 1=strongly disagree, 2=disagree, 3=neutral, 4=agree, 5=strongly agree and NA=Not Applicable.

1. I have a reasonably clear sense of my obligations as a director/trustee. _____
2. I am familiar with this organization's history and what makes it distinctive. _____
3. I have a good understanding of the bylaws, purposes, policies, and programs of this organization as they relate to my role as a director/trustee. _____
4. I have a good understanding of the board's responsibilities. _____
5. I understand the distinction between the governance role of the board and the roles of management and staff. _____
6. I understand the organizational structure and the interrelationship of entities comprising this organization. _____
7. I understand the organization's strategic plan and objectives for the near future. _____
8. I understand the organization's budget and financial statements. _____
9. I have the time and interest to fulfill director/trustee obligations. _____
10. I attend board and committee meetings regularly. _____
11. I am well prepared for meetings (i.e. have reviewed and considered agenda material which is sent in advance of board/committee meetings). _____
12. I sense that I make meaningful contributions to the board's discussion and decision-making. _____
13. I express my reservations or disagreements in a constructive manner as board decisions are being made. _____
14. My committee assignments are within my area of expertise and interest. _____
15. I consistently respect and support board decisions made with due diligence. _____
16. I respect and maintain in confidence, matters of a confidential nature. _____
17. I represent the board and organization positively to its constituencies. _____
18. I contribute time, talent, and resources consistent with the expectations for members of this board and my personal capacity. _____
19. I find membership on this board to be stimulating and fulfilling. _____
20. I work hard at developing and maintaining a spirit of collegiality and positive interpersonal relationships within the board. _____

I have the following suggestions for improving the performance of this board and my capacity to contribute effectively.

Name of Director/Trustee

Signature

Date

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The "5 E's of Leadership" model emphasizes five key actions for effective leadership:

1. Envision
2. Engage
3. Energize
4. Enable, and
5. Execute.

President/CEO evaluation:

Performance areas to consider:

- Leadership ability
- Focus on organizational mission
- Role in external relationships
- Interface with Board of Trustees
- Strategic planning abilities
- Institutional advancement
- Communication performance
- Strengths and opportunities for improvement

Executive Evaluation Instrument

Name: _____ Position: _____ Date: _____

Instruction: Please express your assessment of the candidate's performance of each statement by placing a score in the corresponding blank in column 2 (Score). Use numerical values (range 1 - 5) where 1 = unsatisfactory and 5 = excellent.

	Score
<p>1. Leadership Performance</p> <p>1.1. The President has a clear vision of the future of the institutions on campus.</p> <p>1.2. The President communicates the vision effectively and motivates others in the various institutions to affect this vision.</p> <p>1.3. Leadership of _____ and its core corporations is handled in an orderly manner and is not crisis oriented.</p> <p>1.4. The President maintains an effective team spirit among the senior leadership personnel at _____.</p> <p>1.5. The President delegates responsibilities appropriately and holds persons accountable for results.</p>	<p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>
<p>2. Focus on Mission</p> <p>2.1. The President keeps _____ Board members mindful of and responsive to the value-differentiating themes of spiritual life and wholeness, diversity, and global outreach.</p> <p>2.2. The President is effective in harmonizing the mission, vision and values of Core and Affiliated organizations.</p> <p>2.3. Plans for future development of the institution are referenced to the organization's mission.</p> <p>2.4. The President is effective in aligning institutional mission and values with the mission and values of the Seventh-day Adventist Church.</p>	<p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>
<p>3. Role in External Relationships</p> <p>3.1. The President is well positioned and professionally involved in community (regional and national) activities pertinent to this organization.</p> <p>3.2. The President is effective in creating and sustaining support and goodwill for _____ at regional and national levels.</p> <p>3.3. The President is effective in representing and sustaining this organization's positive image in the minds of Seventh-day Adventist Church members.</p>	<p>_____</p> <p>_____</p> <p>_____</p>
<p>4. Interface with Board of Trustees</p> <p>4.1. The President communicates effectively with board members regarding goals, expectations, and outcomes.</p> <p>4.2. The President keeps board members adequately informed concerning major issues relating to _____ and its affiliated organizations.</p> <p>4.3. The President is comfortable in asking opinions of the board that relate to management of _____.</p> <p>4.4. As a trustee, I have confidence that the President is providing effective leadership towards a good future for _____ and its related organizations.</p>	<p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>

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Trustee Evaluation of the President

Mark the box beneath the term that best expresses your evaluation of each statement.

1. Leadership Performance

1.1. The President has a clear vision of the future of the institutions on campus.

Inadequate Fair Good Very good Excellent

1.2. The President maintains an effective team spirit among the senior leadership personnel.

Inadequate Fair Good Very good Excellent

2. Focus on Mission

2.1. The President keeps Board members mindful of and responsive to the value-differentiating themes of the institution: spirituality, wholeness, diversity, service, excellence.

Inadequate Fair Good Very good Excellent

2.2. The President is effective in aligning institutional mission and values with the mission and values of the Seventh-day Adventist Church.

Inadequate Fair Good Very good Excellent

3. Role in External Relationships

3.1. The President is effective in creating and sustaining support and goodwill for the institution at regional and national levels.

Inadequate Fair Good Very good Excellent

4. Interface with the Board of Trustees

4.1. The President keeps board members adequately informed concerning major issues threats or opportunities for the institution's future.

Inadequate Fair Good Very good Excellent

4.2. I have confidence that the President is providing effective leadership towards a good future for the institution.

Inadequate Fair Good Very good Excellent

5. Strategic Planning

5.1. The President is effective in identifying and developing future leaders for the institution.

Inadequate Fair Good Very good Excellent

6. Institutional Advancement

6.1. The President is effective in generating philanthropic and governmental support for the institution.

Inadequate Fair Good Very good Excellent

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The President/CEO evaluation survey template can be adjusted somewhat for other executives taking into account their role and range of duties.

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Management performance evaluation:

Key components;

- Performance in achieving goals
- Leadership abilities
- Managerial competencies (communication, decision-making, team development, resource management)
- Contribution to organizational objectives/mission

The objective is to recognize strengths and areas for growth, to foster professional development, and to ensure performance is aligned with company goals.

Manager performance appraisal:

- Demonstration of the organization's core values.
- Ability to fulfill expected responsibilities.
- Ability to achieve individual and company objectives.
- Effort toward meeting areas of improvement from their last evaluation.
- Ability to delegate tasks when necessary.
- Ability to show professionalism and leadership skills.
- Ability to collaborate with other managers, employees and supervisors.
- Ability to show proactivity and address potential problems before they develop.

Managerial Leadership Survey

Manager name: _____ Manager position: _____

Date of survey: _____

Place a checkmark after the number that best represents your assessment for each of the following factors where 1=strongly disagree, 2=disagree, 3=neutral, 4=agree, 5=strongly agree, and NA=Not Applicable.

Factors and Items	Rating
1. The manager consistently demonstrates this organization's core values.	1__ 2__ 3__ 4__ 5__ NA__
2. The manager exhibits abilities appropriate for the responsibilities of his/her assignment.	1__ 2__ 3__ 4__ 5__ NA__
3. The manager has shown the capacity to set personal and departmental goals and is results-driven.	1__ 2__ 3__ 4__ 5__ NA__
4. The manager is proficient in delegating tasks and exercising appropriate oversight of others.	1__ 2__ 3__ 4__ 5__ NA__
5. The manager collaborates with employees, supervisors, and other managers.	1__ 2__ 3__ 4__ 5__ NA__
6. The manager shows proactivity in identifying and addressing potential problems thus averting a crisis.	1__ 2__ 3__ 4__ 5__ NA__
7. The manager exemplifies professionalism in conduct and communication.	1__ 2__ 3__ 4__ 5__ NA__
8. The manager is committed to improvement in the work environment.	1__ 2__ 3__ 4__ 5__ NA__
9. The manager encourages ideas and feedback from employees regarding the performance of their tasks.	1__ 2__ 3__ 4__ 5__ NA__
10. The manager assesses opportunities/obligations for change and adapts appropriately.	1__ 2__ 3__ 4__ 5__ NA__
11. The manager treats employees fairly and maintains a safe work environment.	1__ 2__ 3__ 4__ 5__ NA__
12. The manager offers timely support and guidance to team members.	1__ 2__ 3__ 4__ 5__ NA__
13. The manager facilitates learning opportunities for employees and serves as a mentor.	1__ 2__ 3__ 4__ 5__ NA__
14. The manager remains calm and reliable during moments of crisis.	1__ 2__ 3__ 4__ 5__ NA__
15. The manager practices active listening and understands another person's emotions and experiences.	1__ 2__ 3__ 4__ 5__ NA__

How might the manager's performance become more effective? _____

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Manager performance appraisals:

Performance appraisals can be done in two ways or in a combination of the two ways:

1. Use of a survey instrument completed by manager's supervisor, other managers who interface with the manager, and those supervised by the manager. This system described as a 360 degree evaluation.
2. Use of a structured dialog involving manager and the manager's supervisor.

Performance appraisal by interview:

1. Based on dialog rather than numerical ratings.
2. Can be used in combination with survey approach.
3. More future-focused than past performance-focused.
4. Can be more challenging to quantify as data.
5. Ideal for appraisal of management roles but can be adapted for most other situations.
6. May lack input/feedback from those supervised by the manager.
7. One-on-one setting eliminates bogus answers.

Sample questions—appraisal interview

1. What accomplishments this quarter are you most proud of?
2. Which goals did you meet? Which goals fell short?
3. What motivates you to get your job done?
4. What can I do to make your job more enjoyable?
5. What are your ideal working conditions to be the most productive?
6. Which job responsibilities/tasks do you enjoy most?

Manager Appraisal Interview

Sample questions

(Ref: <https://www.quantumworkplace.com/future-of-work/employee-performance-review-questions>)

1. What accomplishments this quarter are you most proud of?
2. Which goals did you meet? Which goals fell short?
3. What motivates you to get your job done?
4. What can I do to make your job more enjoyable?
5. What are your ideal working conditions to be the most productive?
6. What personal strengths help you do your job effectively?
7. What makes you the best fit for your position?
8. What skills do you have that you believe we could use more effectively?
9. What kind of work comes easiest to you?
10. What goals/deliverables were you least proud of? Why? How will you do those differently in the future?
11. What 2-3 things will you focus on in the next quarter to help you grow and develop?
12. What can I do to help you better meet your goals?
13. Which job responsibilities/tasks do you enjoy most? Which do you least enjoy?
14. How do you think your role helps the company succeed?
15. What do you like least about your current role? What would you change?
16. What do you like most about working for this company?
17. Which emerging technologies do you think could catapult our systems to the next level?
18. What aspect of the company's vision excites you the most, and how can we tailor your objectives to tap into that enthusiasm?
19. How do you engage with your employees to obtain feedback on procedures, proficiency, and quality?
20. In what ways are you mentoring people in your staff?

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Professional staff evaluation:

Professional bodies may already have an internal evaluation system/instrument.

The evaluation templates that follow (for physicians and nurses) focus on opinions/perceptions, not necessarily on facts, and thus must not be mistaken for peer reviews.

Medical Staff Performance Appraisal Survey

Name of individual being reviewed: _____

Role and/or position description: _____

Date of review: _____

Place a checkmark after the number that best represents your assessment for each of the following factors where 1=strongly disagree, 2=disagree, 3=neutral, 4=agree, 5=strongly agree, and NA=Not Applicable.

Factors and Items	Rating
1. Communicates effectively with other healthcare professionals.	1__ 2__ 3__ 4__ 5__ NA__
2. Collaborates with physician/nurse colleagues.	1__ 2__ 3__ 4__ 5__ NA__
3. Accepts feedback provided.	1__ 2__ 3__ 4__ 5__ NA__
4. Recognizes his/her limitations.	1__ 2__ 3__ 4__ 5__ NA__
5. Participates effectively as a member of the healthcare team.	1__ 2__ 3__ 4__ 5__ NA__
6. Exhibits professional behavior towards colleagues.	1__ 2__ 3__ 4__ 5__ NA__
7. Performs technical procedures skillfully.	1__ 2__ 3__ 4__ 5__ NA__
8. Selects diagnostic tests appropriately.	1__ 2__ 3__ 4__ 5__ NA__
9. Critically assesses diagnostic information.	1__ 2__ 3__ 4__ 5__ NA__
10. Selects appropriate treatment.	1__ 2__ 3__ 4__ 5__ NA__
11. Accepts responsibility for own professional actions.	1__ 2__ 3__ 4__ 5__ NA__
12. Handles transfer of care appropriately.	1__ 2__ 3__ 4__ 5__ NA__
13. Maintains confidentiality of patients and their families.	1__ 2__ 3__ 4__ 5__ NA__
14. Coordinates care effectively with other professionals.	1__ 2__ 3__ 4__ 5__ NA__
15. Maintains quality medical records.	1__ 2__ 3__ 4__ 5__ NA__
16. Contributes to quality improvement programs and practice guidelines.	1__ 2__ 3__ 4__ 5__ NA__
17. Handles emergency situations effectively.	1__ 2__ 3__ 4__ 5__ NA__
18. Manages own stress effectively.	1__ 2__ 3__ 4__ 5__ NA__
19. Handles requests for consultation in a timely manner.	1__ 2__ 3__ 4__ 5__ NA__
20. Communicates effectively with patients and their families.	1__ 2__ 3__ 4__ 5__ NA__

I have received the results of this review. _____
Signature Date

Comments: _____

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Registered Nurse Performance Appraisal Survey

Name of individual being reviewed: _____

Role and/or position description: _____

Date of review: _____

Place a checkmark after the number that best represents your assessment for each of the following factors where 1=strongly disagree, 2=disagree, 3=neutral, 4=agree, 5=strongly agree and NA=Not Applicable.

Factors and Items	Rating
1. Provides a safe environment specific to patient age and development.	1__ 2__ 3__ 4__ 5__ NA__
2. Assures quality through application of policy, procedure and standards of care.	1__ 2__ 3__ 4__ 5__ NA__
3. Acts as a clinical resource for peers.	1__ 2__ 3__ 4__ 5__ NA__
4. Initial and continued patient assessments are consistently complete.	1__ 2__ 3__ 4__ 5__ NA__
5. Provides safe and culturally sensitive care.	1__ 2__ 3__ 4__ 5__ NA__
6. Exhibits professional behavior towards colleagues.	1__ 2__ 3__ 4__ 5__ NA__
7. Manages unit equipment and supplies responsibly.	1__ 2__ 3__ 4__ 5__ NA__
8. Demonstrates commitment to customer satisfaction and patient advocacy.	1__ 2__ 3__ 4__ 5__ NA__
9. Maintains ethical standards in respecting patient privacy and confidentiality.	1__ 2__ 3__ 4__ 5__ NA__
10. Takes initiative to improve work processes.	1__ 2__ 3__ 4__ 5__ NA__
11. Makes positive contribution to teamwork/collaboration.	1__ 2__ 3__ 4__ 5__ NA__
12. Supports team and leaders in change implementation.	1__ 2__ 3__ 4__ 5__ NA__
13. Responds to patients with empathy, compassion, and quality care.	1__ 2__ 3__ 4__ 5__ NA__
14. Communicates effectively and respectfully.	1__ 2__ 3__ 4__ 5__ NA__
15. Demonstrates good judgment in decision making.	1__ 2__ 3__ 4__ 5__ NA__
16. Demonstrates high personal work standards.	1__ 2__ 3__ 4__ 5__ NA__
17. Demonstrates alignment with institutional mission.	1__ 2__ 3__ 4__ 5__ NA__
18. Manages own stress effectively.	1__ 2__ 3__ 4__ 5__ NA__
19. Maintains clinical competence in patient care.	1__ 2__ 3__ 4__ 5__ NA__
20. Committed to continuous professional growth.	1__ 2__ 3__ 4__ 5__ NA__

I have received the results of this review. _____

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Evaluations/Assessment Scope:

1. Governance (Board performance)
 2. Board meeting evaluation
 3. Director/trustee self-evaluation
 4. Executive evaluation
 5. Management evaluation
 6. Professional staff evaluation
 7. Employee engagement survey
 8. Client satisfaction survey
 9. Program and operational assessment
 10. Mission fulfillment
- } November session

Employee engagement survey:

Employee 'engagement' is qualitatively different from employee 'satisfaction'.

- Satisfaction may derive from location, remuneration, convenient hours, work environment, etc. "In this job I use my mind and my body."
- Engagement refers to the employee's personal investment in the nature and purpose of the job. "In this job I use my heart, my mind, and my body."

Employee
satisfaction
compared to
employee
engagement:



“I consider it a dangerous misconception of mental hygiene to assume that what man needs in the first place is equilibrium or, as it is called in biology, “homeostasis,” i.e., a tensionless state but rather the striving and struggling for a worthwhile goal, a freely chosen task. What he needs is not the discharge of tension at any cost but the call of a potential meaning waiting to be fulfilled by him.”

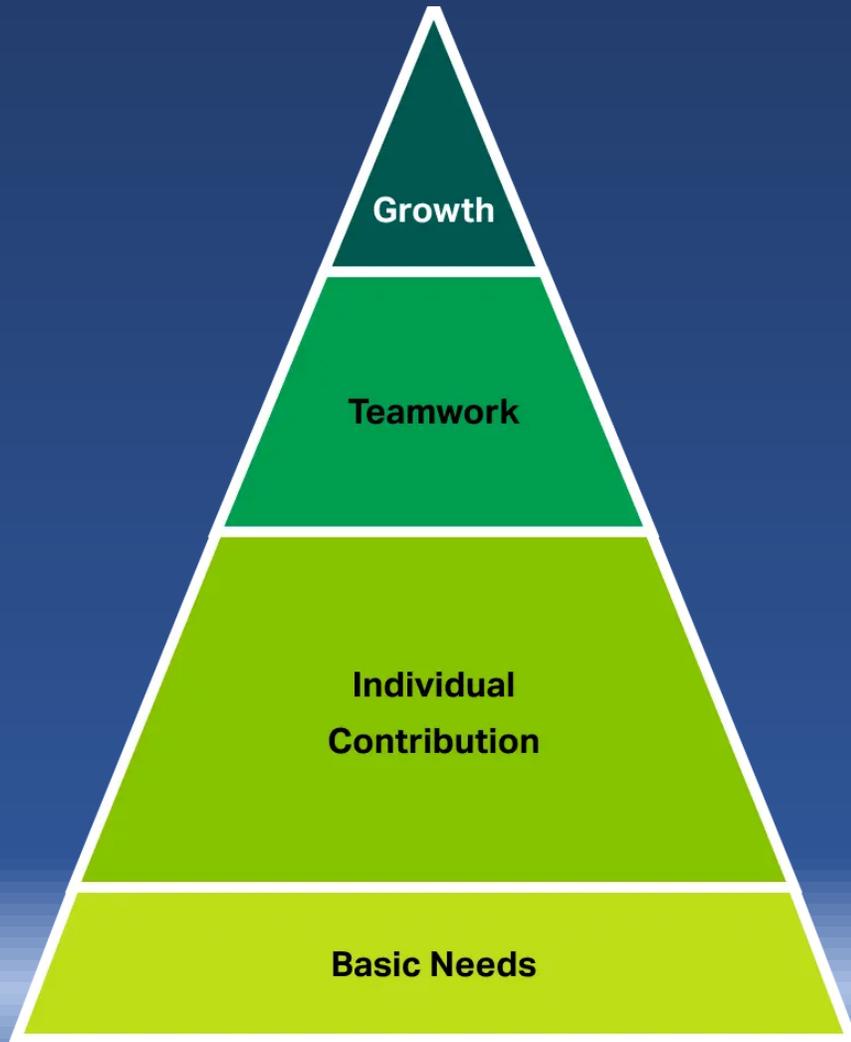
—Victor Frankl, *Search for Meaning*, p. 105

A healthy job provides:

1. Sense of purpose: more than producing goods or services, one that makes a difference.
2. Sense of ownership: having some say in how the work is done.
3. Sense of fit: what I do fits into the larger mission.
4. Sense of community: we are doing this together.
5. Sense of contact: we can build worthwhile relationships

The mind is not always in the same place
as the body.





The Gallup Q¹² survey measures four levels of employee needs, from basic clarity to personal growth. When these needs are met in sequence, they create a workplace where individuals and teams can thrive.

<https://www.gallup.com/q12-employee-engagement-survey/>

Employee Engagement Survey

(Items 1-12 based on Gallup Q12 Survey)

Name of survey respondent : _____

Role and/or position description: _____

Date of review: _____

Place a checkmark after the number that best represents your assessment for each of the following factors where 1=strongly disagree, 2=disagree, 3=neutral, 4=agree, 5=strongly agree, and NA=Not Applicable.

Factors and Items	Rating
1. I am satisfied with this company as a place to work.	1__ 2__ 3__ 4__ 5__ NA__
2. I know what is expected of me at work.	1__ 2__ 3__ 4__ 5__ NA__
3. I have the materials and equipment I need to do my work right.	1__ 2__ 3__ 4__ 5__ NA__
4. At work, I have opportunity to do what I do best every day.	1__ 2__ 3__ 4__ 5__ NA__
5. In the last seven days, I have received recognition or praise for doing good work.	1__ 2__ 3__ 4__ 5__ NA__
6. My supervisor, or someone at work, seems to care about me as a person.	1__ 2__ 3__ 4__ 5__ NA__
7. At work, my opinions seem to count.	1__ 2__ 3__ 4__ 5__ NA__
8. The mission or purpose of my company makes me feel my job is important.	1__ 2__ 3__ 4__ 5__ NA__
9. My associates or fellow employees are committed to doing quality work.	1__ 2__ 3__ 4__ 5__ NA__
10. I have a best friend at work.	1__ 2__ 3__ 4__ 5__ NA__
11. In the last six months, someone at work has talked to me about my progress.	1__ 2__ 3__ 4__ 5__ NA__
12. This last year, I have had opportunities at work to learn and grow.	1__ 2__ 3__ 4__ 5__ NA__

Describe some of the biggest challenges you face here: _____

What suggestions do you have for improving the workplace? _____

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Employee engagement: the MAGIC model

- Meaning
- Autonomy
- Growth
- Impact
- Connection

- **Meaning**—my work has purpose beyond the activity itself
- **Autonomy**—power to shape your work and environment in ways that allow you to perform at your best
- **Growth**—being stretched and challenged in ways that result in personal and professional growth
- **Impact**—seeing positive, effective, and worthwhile outcomes and results from your work
- **Connection**—the sense of belonging to something beyond yourself.

Employee Engagement Survey

Name of survey respondent : _____

Role and/or position description: _____

Date of review: _____

Place a checkmark after the number that best represents your assessment for each of the following factors where 1=strongly disagree, 2=disagree, 3=neutral, 4=agree, 5=strongly agree, and NA=Not Applicable.

Factors and Items	Rating
1. I am proud to work for this organization.	1__ 2__ 3__ 4__ 5__ NA__
2. I would recommend this organization to others as a great place to work.	1__ 2__ 3__ 4__ 5__ NA__
3. I rarely think about looking for a job elsewhere.	1__ 2__ 3__ 4__ 5__ NA__
4. Leaders/managers keep people informed about what is happening.	1__ 2__ 3__ 4__ 5__ NA__
5. Leaders communicate a vision that motivates me.	1__ 2__ 3__ 4__ 5__ NA__
6. I have access to things I need to do my job well.	1__ 2__ 3__ 4__ 5__ NA__
7. I have access to learning and development that I need to do my job well.	1__ 2__ 3__ 4__ 5__ NA__
8. I receive appropriate recognition when I do good work.	1__ 2__ 3__ 4__ 5__ NA__
9. Management shows a genuine interest in my career growth and aspirations.	1__ 2__ 3__ 4__ 5__ NA__
10. My work is meaningful and contributes to company success.	1__ 2__ 3__ 4__ 5__ NA__
11. My role here enables a good work-life balance.	1__ 2__ 3__ 4__ 5__ NA__
12. I feel that I am part of a supportive team.	1__ 2__ 3__ 4__ 5__ NA__
13. My job engages my skills and talents effectively.	1__ 2__ 3__ 4__ 5__ NA__
14. This organization has a great culture of ethics, inclusion, fairness, equality	1__ 2__ 3__ 4__ 5__ NA__
15. I align with the organization's mission and values.	1__ 2__ 3__ 4__ 5__ NA__
16. My work environment inspires me to do my best.	1__ 2__ 3__ 4__ 5__ NA__
17. The organization is committed to quality and excellence.	1__ 2__ 3__ 4__ 5__ NA__

Describe some of the biggest challenges you face here: _____

What suggestions do you have for improving the workplace? _____

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What can be done:

1. Create/sustain healthy workplace culture
2. Highlight mission/vision/values
3. Ensure meaningful work
4. Recognize and appreciate good performance
5. Review policies from an employee's perspective
6. Be sensitive to the impact of workplace changes

Evaluations/Assessment Scope:

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 8. Client satisfaction survey
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 10. Mission fulfillment
- } November session

Client satisfaction:

1. Discover how clients assess their experience with your organization.
2. Improve the quality of care and communication.
3. Evaluate/update procedures that enhance brand reputation and client loyalty.
4. Explore core functions ('4Cs') of primary care: —First Contact, Comprehensiveness, Coordination, Continuity.
5. Responsiveness to surveys can lead to shorter lengths of stay, quicker recovery times, fewer complications, and lower stress related to medical concerns.

Patient Experience Survey

Name of survey respondent : _____

Date of discharge: _____

Participation in this survey is voluntary.

Please tell us about your most recent stay at (NAME OF HOSPITAL) ending on the date of discharge shown above. Place a checkmark after the number that best represents your experience for each of the following factors where 1=strongly disagree, 2=disagree, 3=neutral, 4=agree, 5=strongly agree, and NA=Not Applicable.

Factors and Items	Rating
1. The nurses treated me with courtesy and respect.	1__ 2__ 3__ 4__ 5__ NA__
2. The nurses listened carefully to me.	1__ 2__ 3__ 4__ 5__ NA__
3. The nurses explained things to me in a way I could understand.	1__ 2__ 3__ 4__ 5__ NA__
4. The doctors treated me with courtesy and respect.	1__ 2__ 3__ 4__ 5__ NA__
5. The doctors listened carefully to me.	1__ 2__ 3__ 4__ 5__ NA__
6. The doctors explained things to me in a way I could understand.	1__ 2__ 3__ 4__ 5__ NA__
7. During my stay my room and bathroom were kept clean.	1__ 2__ 3__ 4__ 5__ NA__
8. During my stay I was able to get the rest I needed.	1__ 2__ 3__ 4__ 5__ NA__
9. During my stay the area around my room was kept quiet at night.	1__ 2__ 3__ 4__ 5__ NA__
10. When I needed help, the help came as soon as I needed.	1__ 2__ 3__ 4__ 5__ NA__
11. When given medication I was always informed what the medicine was for and what side effects were possible.	1__ 2__ 3__ 4__ 5__ NA__
12. Doctors/nurses discussed with me/my caregiver the plan for my care after leaving the hospital.	1__ 2__ 3__ 4__ 5__ NA__
13. Doctors/nurses informed me/my caregiver about symptoms/health issues possible after leaving hospital.	1__ 2__ 3__ 4__ 5__ NA__
14. I appreciated the chaplaincy services of this hospital.	1__ 2__ 3__ 4__ 5__ NA__
15. I was informed about the costs for my healthcare and how/when payments were due.	1__ 2__ 3__ 4__ 5__ NA__
16. I would recommend this hospital to my family/friends.	1__ 2__ 3__ 4__ 5__ NA__

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In summary:

Performance evaluations/appraisals must be viewed as part of a much larger approach to employee productivity.

Handled correctly, evaluations can yield positive results both for employees and the organization.

Inferior or incorrect administration of a performance evaluation system can have serious negative consequences in employee morale and relationships.

Setting the stage:

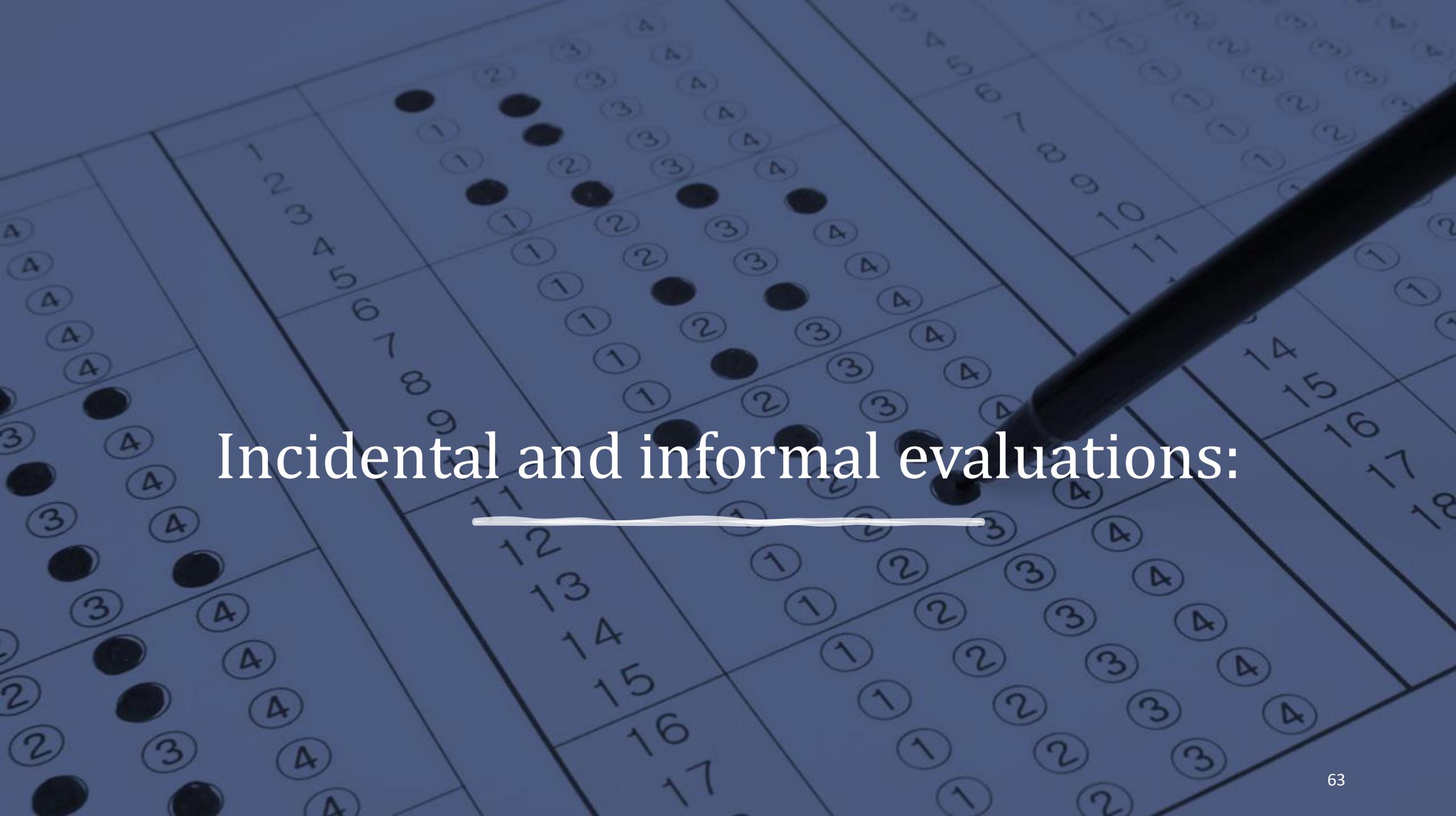
1. Clear job descriptions.
2. Thorough 'onboarding' of employees.
3. 'Book-end' process—Performance is appraised in context of objectives/expectations set earlier.

Performance appraisal system:

- Set performance expectations. ...
- Monitor performance continuously. ...
- Collect feedback and data. ...
- Evaluate performance against expectations. ...
- Conduct the review meeting. ...
- Document the results. ...
- Follow up and plan development.

How to conduct evaluation surveys:

1. Distribute/collect/compile hard copies. (Convenient for Board meeting assessment.)
2. Determine whether responses shall be anonymous. (Board member self-evaluation should be signed.)
3. Third-party administrator for evaluation process.
4. Electronic platform for distribution, collection, compilation for survey results (e.g. Survey Monkey).
5. Sharing of information to affected parties.
6. Timely follow-up to survey results indicating areas needing attention.

The background is a blue-toned image of a grid, likely a calendar or a data table. The grid contains numbers in circles, arranged in rows and columns. A black pen is visible on the right side of the grid, pointing towards the center. The overall aesthetic is professional and clean.

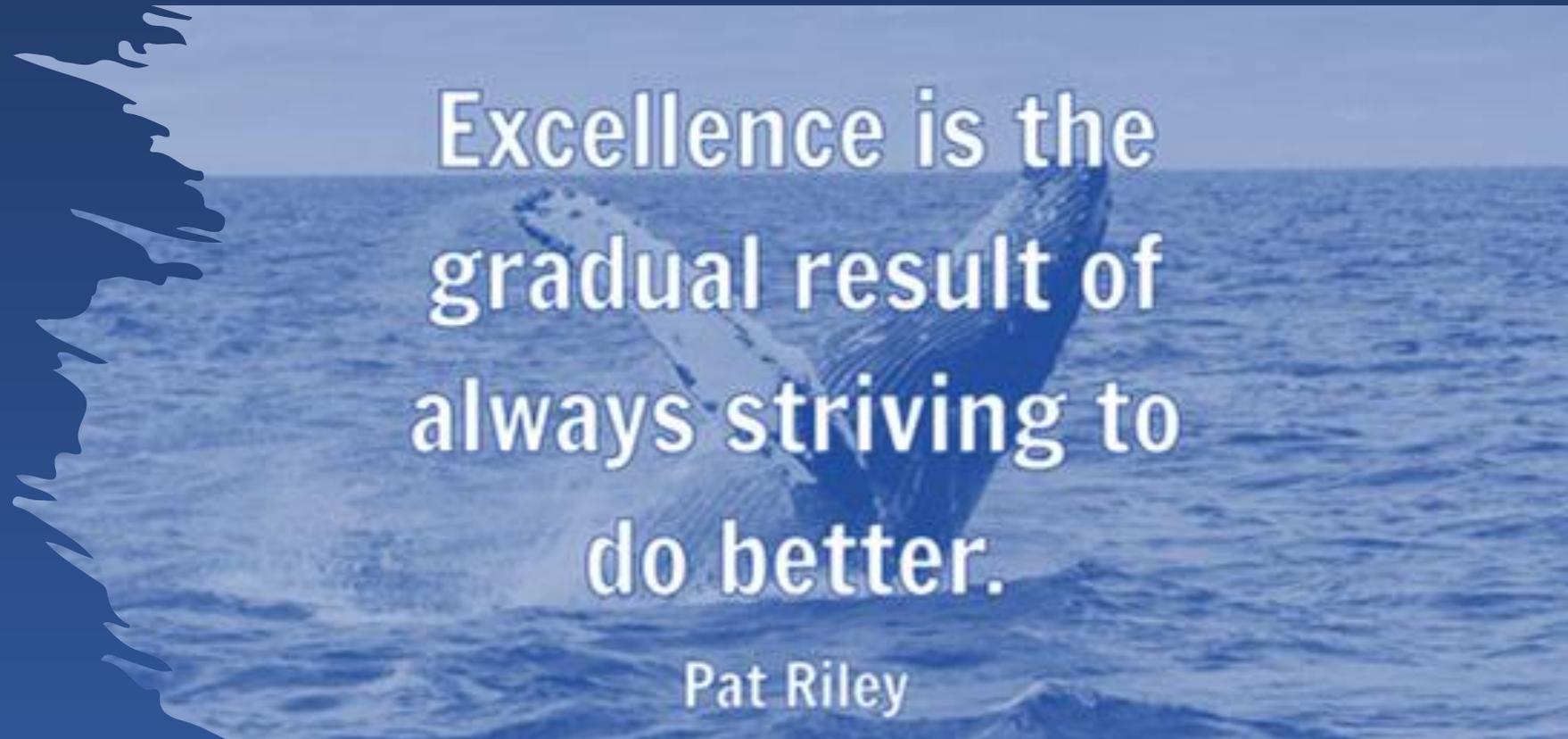
Incidental and informal evaluations:

A posture of openness for improvement:

1. Provide a mechanism for employees to make observations/suggestions for improvement. (e.g. a Suggestion/Recommendation Box)
2. Regularly monitor for submissions.
3. Evaluate and communicate regarding submissions.
4. Acknowledge and affirm actions contributing to excellence.

Resources:

1. [5-keys-of-employee-engagement-magic](#)
2. [NLC-Sample-Nonprofit-CEO-Evaluation-Form_June2022.pdf](#)
3. <https://nrchealth.com>
4. <https://www.boardeffect.com>
5. <https://Stanford Law School Board-self-assessment-questionnaire.pdf>
6. <https://www.globalhealthlearning.org/sites/default/files/page-files/Chapter-Governance-Self-Assessment.pdf>
7. <https://surveymonkey.com>
8. https://www.sjomagnet.org/documents/Organizational_Overview/0010.13-Peer-Reveiw-Clinical-Nurse-1-4.pdf
9. <https://www.gallup.com/q12-employee-engagement-survey/>
10. <https://www.cultureamp.com/blog/employee-engagement-survey-questions>
11. https://www.hcahponline.org/globalassets/hcahps/survey-instruments/web/effective-january-1-2025-discharges-and-forward/2025_final_survey-instruments_english_web_updated.pdf
12. <https://www.ahrq.gov/cahps/surveys-guidance/cg/index.html>
13. <https://www.quantumworkplace.com/future-of-work/employee-performance-review-questions>



Excellence is the
gradual result of
always striving to
do better.

Pat Riley