



# LEADer

*A publication designed to promote visionary and forward-thinking discussions between and among NCGA's Western Corridor co-op leadership*

## A Study Guide for Co-op Leaders Evaluating the General Manager

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# Evaluating the Co-op GM

There are few more important tasks for the co-op board than hiring the general manager and providing feedback on his or her job performance. The board delegates day-to-day operational authority over the co-op and its assets to the GM. To fulfill its fiduciary responsibility for ensuring sound management of the co-op's resources, the board *must* provide feedback and seek to influence the GM's performance in constructive ways.

The challenges of conducting effective, constructive GM evaluations are many. In contrast to other, more typical workplace performance evaluations, the GM evaluation requires building a one-voice message from the board. Anything else will send mixed signals and is unlikely to inspire performance improvements. Having a conversation that adequately recognizes a manager's strengths and areas of top-notch performance, while also offering suggestions for improvement, requires supervisory skills and nuance. This task is much harder to finesse positively for a group than for an individual. In addition, the co-op board doesn't work with the GM every day. So the board must solicit input from others on how the GM manages the co-op as an employer. Getting effective input requires a skilled touch.

In this issue, we offer some general guidelines that can help you and your board design and manage a constructive GM evaluation process. The GM evaluation involves many side issues, including setting goals, compensation negotiation, and dealing with unsatisfactory performance. We don't cover the side topics in this issue but hope to in future issues. We offer this issue and its study guide to help the entire board set up and work through a constructive evaluation process.

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## More about the LEADer

*A publication designed to promote visionary and forward-thinking discussions between and among NCGA's Western Corridor co-op leadership*

- The *LEADer* is published quarterly and is distributed to directors and leaders of Western Corridor co-ops.
- The *LEADer* is now available to all interested co-op leaders at no charge, thanks to the generosity of NCGA's Western Corridor members. You can find information about the LEAD program and all back issues at <http://www.cgin.coop/leader>.
- We welcome your reactions, suggestions, and contributions, as well as questions for us to answer in future issues. Send comments or questions to [askthebest@ncga.coop](mailto:askthebest@ncga.coop).
- The next issue will be available in summer 2011. That issue will focus on strategic planning.
- For more information about NCGA, the Western Corridor, upcoming western regional board training events, the *LEADer*, or the BEST, contact:

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## The LEADer Is Online and Available to ANYONE!

The *LEADer* is available to all interested co-op leaders. This issue and all back issues are available online at <http://www.cgin.coop/leader>. Western Corridor co-ops can have new issues sent directly by e-mail; contact Karen Zimbelman at [kz@ncga.coop](mailto:kz@ncga.coop).



# The Art of Evaluation

by Marcia Shaw and Cindy Owings



Evaluations give us the opportunity to take a step back from day-to-day work and reflect on the bigger questions. Integral to the review process, the board must ask, “Are we meeting goals that can help build alignment between the co-op’s purpose and the roles needed to carry out that work?” The evaluation is also a time to reflect on what’s important and whether management and the board are paying attention to the right stuff. Finally, the evaluation process provides a chance to identify positives and areas of great performance, as well as areas for improvement.

Boards strive for an evaluation process that is consistent with the co-op’s values and its employment principles—a process that is respectful, collaborative, and inclusive in appropriate ways. Accordingly, the evaluation

process will express the co-op’s values and how it wants to treat staff. Consider the following guiding principles that describe the art of evaluation for a co-op board.

## **Provide Timely and Consistent Feedback**

An annual evaluation of the top job in any organization is more difficult than evaluating an entry-level position. The outcomes the board seeks in its evaluation of the GM are broader, more abstract, and less easily measured. But stick to the task, and over time your board will improve in its articulation of goals and data for measurement. It will also gain confidence in offering consistent, meaningful input to the GM.

## **Be Specific and Comprehensive**

Give feedback on job specifics and performance

in all job areas, as well as desired characteristics such as communication, flexibility, and teamwork. Remember that the evaluation sets and reflects the tone by which the board and the GM communicate. Most boards and GMs hope to establish a collegial and cooperative unit. Formally, the board owns the “targets,” and the GM owns the “paths,” but each role is richer if these are two-way conversations. The board and the GM have different jobs, but both jobs are integral to achieving the co-op’s larger purpose. If your GM isn’t strong in a particular area, the board’s job is to articulate weaknesses and to find ways to strengthen the GM’s competencies.

Progress toward agreed-upon goals is measured by concrete, specific variables, and the GM evaluation is the

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## The Art of Evaluation

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summary of those measures. Customer satisfaction might be measured by a survey or by tallying complaints. Employee attitudes might be measured by a comprehensive workplace survey. Fiscal health might be measured by cash flow or debt/equity ratios. All these areas reflect on aspects of the GM's leadership. But the evaluation is not a measure of the GM's personality or lifestyle choices. It is not about whether we like the GM or not. Instead, the evaluation asks if the GM achieved the goals we agreed upon. And to the extent that not everything happens as we expect or desire, the art of evaluation involves reflecting on whether the reasons for the deviation make sense, are sound, and were handled as well as possible. So when we look at measures, we implicitly ask, "Are we measuring what is important to us?"

### Speak with One Voice

At evaluation, as at goal setting, the board must speak with one voice. The GM cannot accomplish a laundry list of suggestions from different board members. When the evaluation

process is complete, the GM must have a clear picture of what the board's conclusions and directives are. Give feedback where it is warranted, without sugarcoating. The GM needs to know if something must improve. Everyone will be unhappy later if the board fails to send a clear message now. By the same token, speak enthusiastically and in detail about things that went well and areas where the board is happy with the GM's performance.

### Deliver No Surprises

Evaluations should reflect on both the past year's performance and accomplishment of previously agreed-upon goals. Except for the first year the GM is in the job, the board and the GM should have already agreed on the year's goals and should have been reflecting on progress directly or indirectly at regular board meetings. Goals sometimes shift as reality rears its head. Sometimes unexpected things happen and we have to be flexible, but there should be no surprises for the GM at evaluation time.

### Arrive at Clear, Agreed-upon Goals

All the above principles rely on the board having ample time to discuss its goals and priorities, set measures to assess progress, provide skillful feedback, and plan the complete evaluation process before it starts. These steps are critical to the maturing of the board and to the development of the board-GM partnership. If an evaluation

ends with written expectations, a major part of the task of evaluating a GM is complete. The more specific and concrete we can be about what success looks like, the more likely everyone will agree on progress at year's end.

### In Sum

A timely, measurable, and sincere evaluation of the GM's job performance is one of the board's most important functions. A review provides guidance, alignment, and a sense of progress on the co-op's goals and priorities. Full board engagement in the evaluation process requires that the board and GM enter into difficult conversations when needed and allows an airing of disagreement when differences become obstructive. But an evaluation process that is respectful and focused on performance, that recognizes accomplishments, and that results in clear and measurable goals will go a long way toward heading off disagreements. Evaluations foster a celebration of accomplishments and the co-op's continued contributions in its local community. Discussions about what is important and how to realize a measure of achievement can sometimes be frustratingly abstract. The GM annual evaluation is one instance where the journey is as important as the destination. Give one another time and patience. Value the process, and it will turn out to be a worthwhile trip.

# Bringing It Full Circle

## A 360-Degree Evaluation

by Lucinda Berdon

Giving your GM the most objective, fairest, and most well-rounded review possible is imperative. But how do you do that when you don't actually work with her or him on a day-to-day basis? You need to identify those people who do work day to day with your GM and gather their feedback to complement the board's own observations. An employee workplace survey is a tool to help provide that information.

Focus on finding out what it's like for employees to work at your co-op and how overall store operations function. Is your co-op a great workplace with good systems in place? Is it a smoothly running store with excellent service, or is there frequent chaos? Are employees given the tools and resources they need to do their jobs? The store's day-to-day operations and functions are good indicators of how well your GM is managing the business.

To get employee input objectively, use an employee survey form with a number rating system (see survey guidelines, below). Allow for and encourage comments. However, be sure to filter out or consider any specific comment as just one person's view—especially a comment that seems emotionally laden or subjective. What you're looking for are observations that you can measure, not personal thoughts, emotions, or philosophical commentary. Smaller co-ops can conduct a relatively informal survey internally with one board member or a staff member coordinating collection and compilation. Larger co-ops generally find value in hiring an HR expert to conduct an employee opinion survey, which will follow a more rigorous process and will include a professional compilation and summary of results.

Regardless of how the survey is conducted, give the staff plenty of time to complete the survey; two weeks is a good time frame. If the survey is easy to complete and the questions are well written, it shouldn't take more than 20 or 30 minutes to complete and you can expect a high level of participation. When that happens, you should end up with a fairly good snapshot of your GM in the day-to-day workplace and a good idea of what it's like for employees to work at your co-op.

Offer the survey to all employees who have worked at your co-op for at least three months. Attach a cover letter to personalize your request for feedback. The letter should emphasize the purpose of the survey and confidentiality. Make it clear that the goal of the survey is not to evaluate

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## Bringing It Full Circle

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the GM but to get staff input on the co-op as an employer. Like financial statements, the results of this survey should be considered just one piece of the various data the board reviews as it compiles its thoughts on the GM's performance. Don't give staff the impression that the survey is meant to evaluate the GM's personal work performance, as this tends to create confusing messages about evaluations and the proper way to channel employee input, feedback, and concerns.

Depending on the size of your store, you might want to dig deeper for input from managers than from other employees. For example, for managers, you might include some open-ended questions regarding the co-op's financial situation, infrastructure, and team cohesiveness. Offering a venue for the GM's coworkers to provide valuable input and feedback in the evaluation process will foster an accountability/empowerment circle that flows in both directions.

### The Staff (Nonmanagement) Survey

A staff survey should include instructions, including the deadline for completion and where to turn in the survey. It should include any demographic data that would be useful but that will still allow staff to respond anonymously. For example, you might ask how long the staff member has worked at the co-op and his or her department. Staff should then give numerical ratings on the co-op in the areas of:

- **Store Operations:** Clear department procedures; job training and preparation; security, safety, and emergency procedures; store cleanliness and attractiveness; customer service standards
- **Personnel Practices:** Clear and specific policies; fair treatment; timely and constructive evaluations; clear disciplinary policies; clear performance expectations; recognition and positive feedback; an atmosphere of teamwork
- **Communication:** Clear and timely notifications from management; management solicitation of staff input; management follow-through on decisions and agreements; management approachability and availability; morale

Conclude with an open-ended question, such as, "How would you describe the atmosphere of the co-op as a workplace?"

### The Management Team Survey

The management survey should include instructions, including the deadline and where to turn in the survey. Generally, it's not possible to ask for department or tenure information from management while still maintaining confidentiality and anonymity, so this information is generally not requested. Using a numeric scale, managers should then rate the general manager in the areas of:

- **Store Operations:** Daily operations; clear procedures; store aesthetics; health department standards and regulations; safety, security, and emergency procedures; staff training; customer service standards
- **Personnel Practices:** Fair and timely evaluations; consistent disciplinary policies; clear job expectations; adequate training for managers; positive and timely GM feedback; management teamwork and leadership
- **Communication:** Clear and timely information and proposals; GM solicitation of staff and management input; GM follow-through on decisions and agreements; GM approachability and availability; morale; consistent scheduling; adequate staffing

The survey should conclude with an open-ended question, such as, "Provide any other comments about the quality of leadership that the GM provides for the co-op."



# Step by Step

## The General Manager Evaluation Process

by Paige Lettington

*Conducting a general manager evaluation can be a daunting process. Besides the fact that people may be uncomfortable with an evaluation, it takes time and coordination to do it well. But you owe it to your general manager to do it well.*

In this article, we'll outline a suggested evaluation process. If you don't already have a process in place, this guide will help you develop one. You might also be able to tap your human resources manager for assistance. While it is not appropriate for the HR manager to be involved in the process itself, he or she will have valuable experience with conducting performance evaluations. If you already have an evaluation process, you can compare these steps with the ones you've been using to identify potential improvements.

A good GM evaluation process should include these major steps:

### Set the Timeline

Determine when the evaluation needs to be completed. Most co-ops evaluate the general manager annually, based on the hire date or the end of the fiscal year. The fiscal year end works well because the evaluation can be coordinated with goal setting for the upcoming fiscal year. Then look at your process and determine how far ahead you need to start. Three to four months is typical. While this may seem like a big time commitment, it's important that evaluations are done on time, especially if a bonus or performance incentive is tied to the results. Make sure that key dates are included on the board's calendar.

### Identify the Evaluation Coordinator

It could be the board president, another officer, an interested director with spare time, the executive committee, or an ad hoc committee of the board, but someone needs to make sure the process moves along and that key tasks are completed in a timely manner.

### Gather Input

Make sure you have your tools (surveys, questions, etc.) in place and allow adequate time to hear back from staff, the management team, board members, and the GM him- or herself. Distribute the surveys and other materials.

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# Step by Step

## The General Manager Evaluation Process

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### Compile Results

After input has been gathered, compile it into a format that helps in the board's review. Typically, you'll have data (such as numerical ratings) from one or more surveys, as well as operational data. Start by simply compiling responses from directors and any feedback you solicited.

### Get Board Agreement

The board needs to review all the input and then build agreement on what will be communicated to the GM regarding his or her performance. It's best that this agreement is reached in person, with all directors, so make sure to build this meeting into your schedule. Allow at least a few hours for the meeting.

Start by reviewing the compiled evaluation results. Where there are pretty similar ratings and comments, it will be easy to agree on the board's overall rating and the key points to pass along. Where there are a variety of views or comments presented, you'll need to spend time considering all perspectives and figuring out how to provide that "one-voice" message to the GM. What does the board wish to communicate in this area? What are the priorities and

key points that directors can agree on? Any disagreements among board members need to be discussed and resolved prior to meeting with the GM. If consensus can't be achieved on specific issues, at least the board must agree on what to present.

### Prepare the Written Evaluation Summary

Coming out of this meeting should be a written, "one-voice" evaluation summary on various aspects of the GM's performance. The summary should include both data and narrative. Be sure to include both positive and negative feedback and to provide concrete examples when possible. Make sure that any comments that are passed along are done so in a way that protects the confidentiality of those who made them—especially staff. Most importantly, make sure the written summary (about one to three pages) offers a clear, concise, and unambiguous evaluation of the board's agreed-upon view of the GM's performance.

### Present the Evaluation to the General Manager

The evaluation team will meet with the GM to review the written evaluation, make sure the feedback is clear, and get agreement on goals for the future. Be sure to provide the GM with a copy of the written evaluation at least a day before the meeting, so he or she has time to review it and formulate thoughts and questions. One person should be designated as

the spokesperson to facilitate the meeting. After the discussion, the board president and the GM should sign the evaluation. A copy should be placed in the GM's personnel file. After the meeting, the evaluation committee should prepare a report on the discussion and agreements for the entire board's review.

### Review and Debrief

As a final step, while they're fresh in your minds, review your process and tools to assess how well they worked and to record any changes needed for the following year. This is also a good time to schedule the start of the process for next year, so that it gets on the board's calendar and can be completed on time.



# Parting Shots from a Co-op GM

## The Three Best and Three Most Challenging Things about Working with a Board

by Michele Adams



*Michele Adams retired from First Alternative Co-op in January 2011 after serving as GM for 10 years and after a two-year planning process for management transition. We invited her to share her thoughts on what she liked best and found most challenging about working with a co-op board. Luckily for us, she has agreed to continue to serve on the Board Effectiveness Support Team (BEST) in the coming months.*

*Thanks, Michele!*



After serving as First Alternative Co-op's general manager for 10 years, I've come away with a lot of respect for the hardworking people who are willing to spend their time as directors. Despite some challenging times along the way, overall it was a rewarding experience.

Thinking back on the years I spent as GM, most rewarding about working with a board was the chance to work with such wonderful, dedicated people, who care so much about their co-op. I've enjoyed the people who donate their time to the co-op and are willing to spend hours each month at meetings working on long-range vision. I've gotten to know some great member-owners who love the co-op as much as I do and work hard to make the store even better. When we did our two expansions and opened our second store, board members came together with management and members

to discuss the process and what costs we were going to incur. I felt like we really worked as a team to make that project successful.

I also found that the board did some really interesting work. Board meetings could be long, and controversial issues came up often, but the work was never boring. It was often engrossing. The First Alternative board worked together to develop ends statements that we could all agree with. When board members weren't happy with cost overruns for our second store expansion, they let me know as a group what their future expectations were. Through those experiences, the directors and I grew to respect each other, and we got along well. I value all the ideas and opinions that came from those who took the time to attend board meetings and express their views.

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## Parting Shots from a Co-op GM

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I also really enjoyed working cooperatively with people for a common goal. Once a long-range goal was established, which was essential for both the board and management, working together as a team to reach that goal was very rewarding. Our long-range goals included providing as many local products as possible, with outstanding customer service, and providing organic and healthy food choices to all customers.

There were some challenges to the GM job as well, of course. Board turnover and lack of consistency was at the top of the list of frustrations for me. I've heard about co-ops with long-term board members who are active and contribute a lot to the businesses. That seems like an ideal situation. Even with staggered terms for board members, we had many directors who left before their terms ended or who served for just one, two, or three years. So much time was spent bringing new members up to speed that it was difficult to get work done. High board turnover also meant that the board's views changed frequently and that the board

had to spend more time building agreement around goals. For instance, we ended up going over the fact that product selection is not the board's job every few years with new people, and this discussion inhibited moving forward on the more important work that needed to get done.

Almost every co-op has had a disgruntled staff member or member-owner get elected to the board and then use it as a forum for an inappropriate agenda. This situation came up at our co-op and was both challenging and frustrating. It was a time and energy drain for management and the board. In our case, a former staff person got elected and tried to drag the board into staff-management issues. He set up private meetings that I was not informed of (where inappropriate issues were discussed). This made my life quite miserable for over a year. My energy was diverted from doing my job to dealing with gossip and innuendos. This director seemed to have a private vendetta against me as the GM. At each board meeting, he would vote to not accept my reports, even though the rest of the board did not follow his lead. The situation eventually led me to give notice, because I felt helpless to control the issues that were coming up and felt somewhat unsupported by the board.

This kind of situation is challenging because the board needs to listen to members and staff but also needs to trust the manager and respect his or her

choices. This balance is essential for the co-op to survive as a business. It's important to set limits for members who keep complaining about operational issues over and over. The board must focus on its work rather than on one person's pet peeve.

Communication between the board and GM can be difficult unless an effort is made to meet regularly. It worked well when the board president and I met once a month to make sure things were going as planned and that there would be no surprises at committee or board meetings. These meetings gave us a chance to discuss and prepare for any issues that might come up and to build agreement about how to handle concerns in advance. It also meant we could prepare any information or materials the board needed to review before meetings.

All in all, being a co-op general manager was a very rewarding experience. Together with the board and many great staff members, we were able to accomplish a lot in those 10 years—making our co-op successful and a major contributor to our community. I'm proud to continue with the store in my new role as a deli and bulk worker and am enjoying the new perspective that working on the floor gives me. It has been a full-circle ride on the roller-coaster of the co-op, and I know there's a lot more excitement to come.

# Check It Out!

## For More Information

Compiled by Martha Whitman

Here are some additional resources on managing the GM evaluation process:

**“General Manager Evaluation”** by Karen Zimbelman and Carolee Colter. *Cooperative Grocer* magazine, September/October 1993. <http://www.cooperativegrocer.coop/articles/2004-01-09/general-manager-evaluation>

**“Evaluating the General Manager”** by Mark Goehring and Carolee Colter. *Cooperative Grocer* magazine, July/August 2009. Geared to boards using Policy Governance. <http://www.cooperativegrocer.coop/articles/2009-07-02/evaluating-general-manager>

**“Formalizing the Process of Evaluating Managers, Executives.”** *Business Journal* (Milwaukee), August 24, 2003. Addresses issues related to who provides input on a general manager evaluation. <http://www.bizjournals.com/milwaukee/stories/2003/08/25/smallb3.html>

**“How Are We Doing? Evaluating the Performance of the Chief Administrator.”** *Popular Government*, winter 1994. Details steps involved in preparing and doing manager evaluations. <http://www.sog.unc.edu/pubs/electronicversions/pg/pdfs/pghowarewe.pdf>

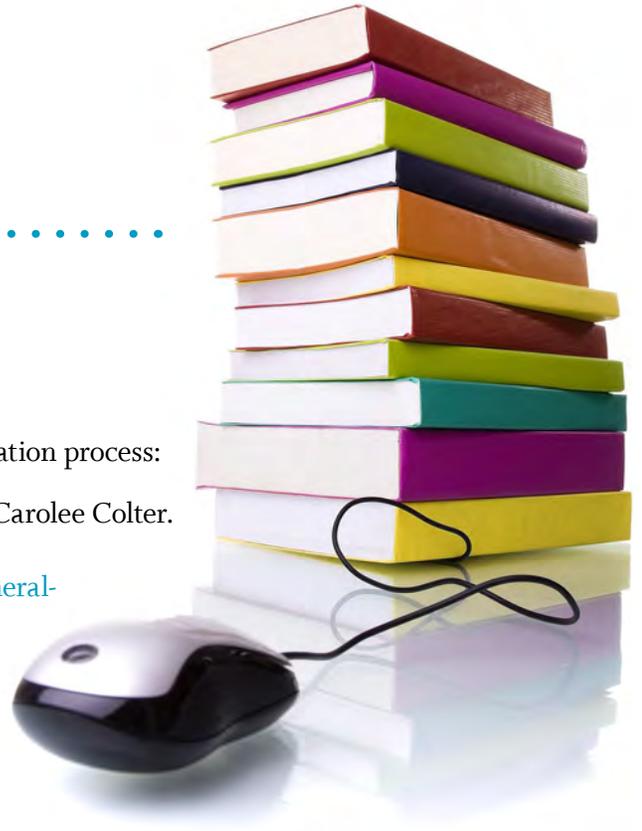
**“Appraising Manager Performance.”** USDA Rural Development Administration. Cooperative Services Research Report 136. This in-depth article covers developing standards for a co-op general manager’s performance. It includes several sample forms. <http://www.rurdev.usda.gov/rbs/pub/rr136.pdf>

**“General Manager 360-Degree Evaluation Process”** by Richard Lewis and Joanne Ford-Robertson, Round Top Consulting Associates. A basic summary of the six steps in completing a 360-degree evaluation. <http://www.roundtoplewis.com/360-Evaluation%20Outline-General%20Manager.pdf>

You can also find sample GM evaluation forms in the CGIN basic resource library.

## Next Issue Focus: Strategic Planning

Our next issue, which will come out in late June, will look at strategic planning. We’ll look at the board’s role in the planning process, as well as the distinction between strategic thinking and strategic planning. We’ll especially look at how the board can contribute to setting the co-op’s direction through its perspectives on the conditions and factors that will affect the co-op’s ability to meet its mission and goals. We welcome your thoughts, questions, ideas, and tips on this topic. Send them to [askthebest@ncga.coop](mailto:askthebest@ncga.coop) or contact Karen Zimbelman ([kz@ncga.coop](mailto:kz@ncga.coop)).



# THE EVALUATION PROCESS

A LEADER STUDY GUIDE

## REFLECTING ON YOUR EXPERIENCE WITH EVALUATIONS



For some of us, the notion of an evaluation is highly anxiety producing. We don't like getting evaluated and don't like evaluating others much more. This anxiety could result from an experience with a harsh or poorly done evaluation, or just difficulty in constructively delivering criticism. It can be tempting to just avoid evaluations with noncommittal soft words that don't say much. However, those who get no information from their bosses feel disconnected and disoriented.

Before starting up your GM's evaluation process, it might be useful for all directors to spend some time reflecting on their own experiences of evaluation—the good, the bad, and the ugly. From those reflections you can create a description of how you want the process to feel. Start by reminding yourselves that the reason we do this hard work is because we love our co-op and we want it to be the best it can be. Evaluation is our attempt to align our imperfect behavior with our lofty goals and far-reaching vision.

### Questions for your consideration:

1. In your own experiences with evaluations, have you found them to be constructive? What did you like about them? What did you dislike about them?
2. In an ideal world, if you looked forward to an evaluation, what would the process look like? What would it involve? How would you engage in the evaluation?
3. Based on your experiences and thoughts, how might the board conduct the GM evaluation process to make it one that you would enjoy as a co-op general manager, and that you could feel good about as part of the GM's supervisory team?

# THE EVALUATION PROCESS

## A LEADER STUDY GUIDE

### A GM EVALUATION PROCESS PLANNER

Here are the key steps that need to be completed to carry out a GM evaluation. Use this planner in developing your evaluation process timeline and in building agreement about the process. Simply add deadlines for completing each step in the right-hand column. Note: It's often easiest to build this kind of timeline from the bottom; work backward from the completion date.

Evaluation Steps	Suggestions	Deadline
Develop the evaluation timeline, deadlines, and meeting schedule.	Make sure all involved put the required in-person meetings on their calendars.	
Clarify who is responsible for coordinating the evaluation.	It could be the board president, another officer, or another director. The coordinator could be supported by the co-op's HR manager.	
Finalize forms to be used in the GM evaluation.	Develop forms appropriate to the role of those completing them. Make sure there is board agreement on the forms to be used. Clarify the time period being evaluated as well.	
Distribute forms to those submitting input on the GM's evaluation.	Forms can be on paper or electronic (including online surveys). The GM should complete a self-evaluation as well.	
Establish a deadline for completed forms.	Allow at least <i>two weeks</i> for those completing the forms. Provide a secure and confidential way for them to submit their comments.	
Compile the evaluation input and distribute that compilation to all directors.	It should be a verbatim compilation of all ratings and comments.	
Meet to review and develop agreed-upon evaluation findings (an in-person meeting with board members only).	The board reviews and develops its agreement on its "one-voice" evaluation of the GM's performance.	
Prepare the evaluation summary of the board's agreed-upon ratings and comments.	This should be a succinct, clear summary of what the board agrees are key strengths and accomplishments, as well as key areas of focus for the future. Recommended one to three pages total.	
Review the evaluation findings and goals with the GM (at an in-person meeting with the evaluation team).	Allow time for an uninterrupted and thorough conversation.	
Complete and finalize all evaluation documentation.	Make sure final copies are signed and placed in the GM's personnel file.	
Review the evaluation forms and process and note any future changes.	Note areas to change, how to adapt the schedule or timeline, and so on.	
Recommend a start date for next year's evaluation process.	Make sure you do not get behind on this important task. Get it on the board's calendar now.	