

## Collaborative Leadership Assessment

Once your organization has [set short-term and long-term P.A.C.T. Goals](#), the next step is to inform individuals that they will be asked to participate in an annual three-part assessment process. This entire process should be completed with the organization's P.A.C.T. Goals in mind.

The first part of this process will focus on the **impact of organizational leaders**. Anyone in a leadership role, whether clergy, professional staff, or volunteer, who has an impact on the function and mission of the organization can and should utilize this assessment for one another and for themselves. The second component of this reflective process is centered around evaluating **leadership skills and core competencies**. The final section of this assessment process provides an opportunity for individuals to evaluate **how well they think the organization is fulfilling its core mission, priorities, and desired outcomes**.

With this assessment data in hand, individuals can work together to acknowledge strengths, identify areas for improvement, and clarify why some goals are being achieved while others seem more challenging. This reflective process is essential for all individuals to understand the impact of their leadership and to focus on how to evolve in their roles to continue to help the organization thrive.

### The Process

An effective assessment process is crucial to the success of any organization. When managed and implemented properly it allows organizations to recognize individuals who are performing well, identify individual and organizational gaps, and provides a framework for holding all individuals accountable for their objectives.

Going through an assessment can be a wonderful opportunity for individuals to find increased role satisfaction and renewed pride in their work. This process has been designed as an opportunity for clergy, lay leaders and senior staff to be reflective, identify specific objectives, clarify assignments moving forward and focus on fostering an overall culture of excellence across the organization.

Assessments should only be conducted for those who have been in their roles for a minimum of six months and should be re-assessed once each year. Organizations may choose to modify some of the assessment tools based on unique variables pertaining to specific roles. For example, an assessment for an Education Director may include some questions about curricular goals, and a CFO's assessment may include a question about budget planning.

### To Consider Before and During a Collaborative Leadership Assessment Process

To help a person identify areas of strength and areas in which they can improve, assessments are designed to provide valuable feedback on one's leadership presence, level of productivity, and overall impact on and fit within the organization. It is important for individuals to feel a mutual sense of ownership of an assessment process. This is not a top-down process but rather a dialogue between and among individuals. Positive and constructive feedback should be shared with individuals

throughout the year. When this happens well, there shouldn't be any surprises that come up during an annual assessment discussion.

Remember, the assessments will be completed by individual themselves, and by the previously appointed Mutual Review Team. The Mutual Review Team should be comprised of three or four people who represent the diverse constituents of the organization and are jointly agreed-upon. This team should include the individual's direct supervisor, and all members should have specific knowledge of the individual's work. The evaluators should and can reach out to other senior and professional staff to gather feedback to inform their work.

The rating scale on the assessment form: please note that giving or receiving perfect ratings across the board may feel good but is not helpful or appropriate for an assessment. The rating scale is a tool to help identify excellence and areas a person should focus on with greater intention and skill during the coming year. The rating scale is not about being nice and complimentary but rather is about giving and receiving genuine and constructive feedback to help individuals and organizations learn, grow, and improve.

Effective leaders learn from constructive feedback and apply takeaways to their work. It is critical for organizations to ensure that there is alignment regarding an individual's work. Setting precise goals with timelines and strategies for a person to achieve those goals is a desirable and useful result of an assessment.

- Consider whether an individual is taking initiative and trying to learn and grow in the role.
- Is the organization doing all it can to help individuals succeed and thrive in their positions?
- Has the organization been successful at identifying and fully utilizing a person's skills?
- Are there new or expanded assignments or opportunities available within the organization to help the individual meet their maximum potential?

**The goal of the assessment process is to ensure that expectations and results, both successes and challenges, are fully discussed to support individuals in their work and professional development in service of meeting the organizational goals and priorities.**

## Directions

1. Review your [Collaborative Goal Setting](#) document and other existing goals.
2. Complete Part 1 and Part 2 of the assessment for each of the individuals being assessed.
  - a. Individuals will also assess themselves.
  - b. Each question in the assessment is on a scale, but also includes a space for comments. General feedback, praise or areas to improve are encouraged. If there is a specific example of a success, this should be included as well.
3. Complete Part 3, Organizational Achievement in Key Functional Areas Assessment. This is based on your priorities as indicated on your [Collaborative Goal Setting](#) document.
4. Schedule a discussion to review all results.

5. Following this conversation, individuals will determine new goals and action steps in response to feedback.
6. All participants of the review process are responsible for keeping physical or electronic record of assessments, and parties can decide if there is a central location where a copy should be kept.

Name: \_\_\_\_\_

Position: \_\_\_\_\_

Assessed by: \_\_\_\_\_

Assessment date: \_\_\_\_\_

## Part 1: Impact & Presence

**This individual's actions contribute to our community's success.**

1 Strongly Disagree	2	3	4	5 Strongly Agree
<b>Comments:</b>				

**This individual has the tools and resources needed to do their job well.**

1 Strongly Disagree	2	3	4	5 Strongly Agree
<b>Comments:</b>				

**This individual functions as a team player.**

1 Strongly Disagree	2	3	4	5 Strongly Agree
<b>Comments:</b>				

**This individual has a positive impact on morale across the organization.**

1 Strongly Disagree	2	3	4	5 Strongly Agree
<b>Comments:</b>				

**This individual offers constructive feedback to other leaders within the organization.**

1 Strongly Disagree	2	3	4	5 Strongly Agree
<b>Comments:</b>				

<b>This individual initiates discussions to resolve conflicts.</b>				
1 Strongly Disagree	2	3	4	5 Strongly Agree
<b>Comments:</b>				

<b>This individual brings added value to our organization or congregation as a whole.</b>				
1 Strongly Disagree	2	3	4	5 Strongly Agree
<b>Comments:</b>				

<b>This individual works collaboratively.</b>				
1 Strongly Disagree	2	3	4	5 Strongly Agree
<b>Comments:</b>				

<b>This individual demonstrates a deep commitment to helping our organization grow and thrive.</b>				
1 Strongly Disagree	2	3	4	5 Strongly Agree
<b>Comments:</b>				

<b>This individual is committed to working in innovative ways to meet the organization's goals.</b>				
1 Strongly Disagree	2	3	4	5 Strongly Agree
<b>Comments:</b>				

<b>This individual is approachable and accessible to staff, lay leaders, and members regularly.</b>				
1 Strongly Disagree	2	3	4	5 Strongly Agree
<b>Comments:</b>				

<b>This individual carries out all responsibilities in an ethical manner.</b>				
1 Strongly Disagree	2	3	4	5 Strongly Agree
<b>Comments:</b>				

<b>This individual is a good fit for our organizational culture.</b>				
1 Strongly Disagree	2	3	4	5 Strongly Agree
<b>Comments:</b>				

<b>This individual effectively navigates organizational politics.</b>				
1 Strongly Disagree	2	3	4	5 Strongly Agree
<b>Comments:</b>				

<b>This individual is reliable and follows through on commitments.</b>				
1 Strongly Disagree	2	3	4	5 Strongly Agree
<b>Comments:</b>				

<b>This individual leads with confidence.</b>				
1 Strongly Disagree	2	3	4	5 Strongly Agree
<b>Comments:</b>				

<b>This individual is a skilled listener.</b>				
1 Strongly Disagree	2	3	4	5 Strongly Agree
<b>Comments:</b>				

<b>This individual demonstrates excellence in their role.</b>				
1 Strongly Disagree	2	3	4	5 Strongly Agree
<b>Comments:</b>				

## Part 2: Core Leadership Skills and Competencies

It is important to assess how all parties work on their own and as part of the larger system. In their book, *When Moses meets Aaron (Alban 2007)*, Gil Rendle and Susan Beaumont argue that supervisors need to explore how staff are working with others. Core competencies explore *how* leaders do their work not just what programs they offer or goals they have achieved. Collaboration, openness, and honesty are examples of core competencies. A professional or lay leader may achieve 3 out of their 4 goals but do their work in a non-collaborative way that is inconsistent with community expectations.

<b>Definitions for Assessment Ratings</b>	
<b>Distinguished</b>	Sustained exceptional performance. Performance and outcomes achieved at this level are clearly unique and far in excess of established expectations. Achievements are clearly the best among peers.
<b>Exceeds Expectations</b>	Consistently exceeds established standards. Performance is commendable and significantly better than average. The team member exhibits mastery of most dimensions of the field of work performed.
<b>Meets Expectations</b>	Performance satisfies the requirements of the job. Performance competently meets standards set for the position on a consistent basis.
<b>Needs Improvement</b>	Performance does not meet an acceptable level in all areas, but team member is steadily improving. Improvement is required in significant dimensions of the job to meet the expectations and standards for work quality.
<b>Unsatisfactory</b>	Performance fails standards established for the job and team member has exhibited little or no improvement in job performance. Significant performance improvement needed.

**Name:** \_\_\_\_\_  
**Position:** \_\_\_\_\_  
**Assessed by:** \_\_\_\_\_  
**Assessment date:** \_\_\_\_\_

## Part 2: Core Leadership Skills and Competencies

<b>Builds constructive working relationships with others characterized by a high level of acceptance, warmth, and mutual respect.</b>				
<input type="checkbox"/> Unsatisfactory	<input type="checkbox"/> Needs Improvement	<input type="checkbox"/> Meets Expectations	<input type="checkbox"/> Exceeds Expectations	<input type="checkbox"/> Distinguished
<b>Comments:</b>				

<b>Incorporates relevant data to grasp issues, draw conclusions, and solve problems.</b>				
<input type="checkbox"/> Unsatisfactory	<input type="checkbox"/> Needs Improvement	<input type="checkbox"/> Meets Expectations	<input type="checkbox"/> Exceeds Expectations	<input type="checkbox"/> Distinguished
<b>Comments:</b>				

<b>Develops new ideas and strategies to complete tasks and assignments.</b>				
<input type="checkbox"/> Unsatisfactory	<input type="checkbox"/> Needs Improvement	<input type="checkbox"/> Meets Expectations	<input type="checkbox"/> Exceeds Expectations	<input type="checkbox"/> Distinguished
<b>Comments:</b>				

<b>Makes timely, informed decisions that take into account the facts, goals, constraints, risks, and implications.</b>				
<input type="checkbox"/> Unsatisfactory	<input type="checkbox"/> Needs Improvement	<input type="checkbox"/> Meets Expectations	<input type="checkbox"/> Exceeds Expectations	<input type="checkbox"/> Distinguished
<b>Comments:</b>				

<b>Takes personal responsibility for the quality and timeliness of work and achieves results with little oversight</b>				
<input type="checkbox"/> Unsatisfactory	<input type="checkbox"/> Needs Improvement	<input type="checkbox"/> Meets Expectations	<input type="checkbox"/> Exceeds Expectations	<input type="checkbox"/> Distinguished
<b>Comments:</b>				



**Prioritizes the member experience and level of satisfaction across the organization.**

<input type="checkbox"/> Unsatisfactory	<input type="checkbox"/> Needs Improvement	<input type="checkbox"/> Meets Expectations	<input type="checkbox"/> Exceeds Expectations	<input type="checkbox"/> Distinguished
<b>Comments:</b>				

**Earns others' trust and respect through honesty, transparency, maintaining confidentiality when necessary, and demonstrating a high level of professionalism in all interactions.**

<input type="checkbox"/> Unsatisfactory	<input type="checkbox"/> Needs Improvement	<input type="checkbox"/> Meets Expectations	<input type="checkbox"/> Exceeds Expectations	<input type="checkbox"/> Distinguished
<b>Comments:</b>				

**Promotes cooperation and collaboration with other leaders and staff.**

<input type="checkbox"/> Unsatisfactory	<input type="checkbox"/> Needs Improvement	<input type="checkbox"/> Meets Expectations	<input type="checkbox"/> Exceeds Expectations	<input type="checkbox"/> Distinguished
<b>Comments:</b>				

**Shares appropriate information clearly, promptly, and effectively.**

<input type="checkbox"/> Unsatisfactory	<input type="checkbox"/> Needs Improvement	<input type="checkbox"/> Meets Expectations	<input type="checkbox"/> Exceeds Expectations	<input type="checkbox"/> Distinguished
<b>Comments:</b>				

**Is proactive in seeking information and staying informed.**

<input type="checkbox"/> Unsatisfactory	<input type="checkbox"/> Needs Improvement	<input type="checkbox"/> Meets Expectations	<input type="checkbox"/> Exceeds Expectations	<input type="checkbox"/> Distinguished
<b>Comments:</b>				

## Part 3: Organizational Achievement in Key Functional Areas

The impact and effectiveness of organizations can be assessed by evaluating the core functions within the system and the services provided across the organization and to the larger community.

Organizations are a composite of many tasks and responsibilities. There are times when one or another area of responsibility will take precedence, and there are certain functions that predominate either because they reflect the individuals' strengths or because they are at the center of the organization's mission or culture. Please review your organization's priorities that you outlined in the goal setting document at the beginning of the year.

Before beginning the evaluation, review the assessment below and star each of your priority objectives. For those objectives, evaluate:

- How well are you doing in these areas?
- Have these priorities changed since the rabbi began in the community? How and why?

### Organizational Functions and Services Provided (suggestions):

- Pastoral Care
- Education
- Administration
- Social Activism
- Visionary Leadership
- Scholarship
- Strengthening Community and One's Sense of Belonging
- Worship
- Spiritual Guidance
- Financial Resource Development
- Professional Workplace Culture

<b>Definitions for Organizational Function Ratings</b>	
<b>Distinguished</b>	Exceptional. Outcomes achieved at this level are clearly unique and far in excess of established expectations.
<b>Exceeds Expectations</b>	Consistently exceeds established standards. Commendable efforts and significantly better than average. Demonstrated mastery of most dimensions of this functional area.
<b>Meets Expectations</b>	Satisfies the requirements. Competently meets standards on a consistent basis.
<b>Needs Improvement</b>	Does not meet an acceptable level in all areas. Improvement is required to meet the organization's expectations and standards.
<b>Unsatisfactory</b>	Standards are not being met and there has been no improvement in this functional area. Significant improvement is needed immediately.

## Part 3: Organizational Achievement in Functional Areas

### Provides pastoral care, visits the sick, comforts the bereaved, etc.

  
Unsatisfactory

  
Needs  
Improvement

  
Meets Expectations

  
Exceeds  
Expectations

  
Distinguished

**Comments:**

### Provides high quality educational programs and classes for members of all ages

  
Unsatisfactory

  
Needs  
Improvement

  
Meets Expectations

  
Exceeds  
Expectations

  
Distinguished

**Comments:**

### Effectively and responsibly manages finances, business administration and operations.

  
Unsatisfactory

  
Needs  
Improvement

  
Meets Expectations

  
Exceeds  
Expectations

  
Distinguished

**Comments:**

### Fosters meaningful opportunities for social activism and action; Serves as an agent for change in the broader community.

  
Unsatisfactory

  
Needs  
Improvement

  
Meets Expectations

  
Exceeds  
Expectations

  
Distinguished

**Comments:**

### Visionary leadership inspires people about future possibilities.

  
Unsatisfactory

  
Needs  
Improvement

  
Meets Expectations

  
Exceeds  
Expectations

  
Distinguished

**Comments:**

**Strengthens community and one's sense of belonging. Builds alliances and partnerships within and outside the walls of the organization.**

<input type="checkbox"/> Unsatisfactory	<input type="checkbox"/> Needs Improvement	<input type="checkbox"/> Meets Expectations	<input type="checkbox"/> Exceeds Expectations	<input type="checkbox"/> Distinguished
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**Comments:**
**Leads and provides meaningful worship experiences, ceremonies, holiday observances, and rituals.**

<input type="checkbox"/> Unsatisfactory	<input type="checkbox"/> Needs Improvement	<input type="checkbox"/> Meets Expectations	<input type="checkbox"/> Exceeds Expectations	<input type="checkbox"/> Distinguished
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**Comments:**
**Provides spiritual guidance and supports members, congregants or constituents on their religious journeys.**

<input type="checkbox"/> Unsatisfactory	<input type="checkbox"/> Needs Improvement	<input type="checkbox"/> Meets Expectations	<input type="checkbox"/> Exceeds Expectations	<input type="checkbox"/> Distinguished
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**Comments:**
**Facilitates successful development campaigns and initiatives to secure critical funding.**

<input type="checkbox"/> Unsatisfactory	<input type="checkbox"/> Needs Improvement	<input type="checkbox"/> Meets Expectations	<input type="checkbox"/> Exceeds Expectations	<input type="checkbox"/> Distinguished
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**Comments:**
**Makes learning classic Jewish texts accessible and promotes lifelong Torah study.**

<input type="checkbox"/> Unsatisfactory	<input type="checkbox"/> Needs Improvement	<input type="checkbox"/> Meets Expectations	<input type="checkbox"/> Exceeds Expectations	<input type="checkbox"/> Distinguished
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**Comments:**
**Hires, trains, supports and successfully retains top professional talent to serve the community.**

<input type="checkbox"/> Unsatisfactory	<input type="checkbox"/> Needs Improvement	<input type="checkbox"/> Meets Expectations	<input type="checkbox"/> Exceeds Expectations	<input type="checkbox"/> Distinguished
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**Comments:**

Maintains a professional workplace culture.				
<input type="checkbox"/> Unsatisfactory	<input type="checkbox"/> Needs Improvement	<input type="checkbox"/> Meets Expectations	<input type="checkbox"/> Exceeds Expectations	<input type="checkbox"/> Distinguished
<b>Comments:</b>				

\*Use for your organization's additional objectives.\*

<input type="checkbox"/> Unsatisfactory	<input type="checkbox"/> Needs Improvement	<input type="checkbox"/> Meets Expectations	<input type="checkbox"/> Exceeds Expectations	<input type="checkbox"/> Distinguished
<b>Comments:</b>				

<input type="checkbox"/> Unsatisfactory	<input type="checkbox"/> Needs Improvement	<input type="checkbox"/> Meets Expectations	<input type="checkbox"/> Exceeds Expectations	<input type="checkbox"/> Distinguished
<b>Comments:</b>				

<input type="checkbox"/> Unsatisfactory	<input type="checkbox"/> Needs Improvement	<input type="checkbox"/> Meets Expectations	<input type="checkbox"/> Exceeds Expectations	<input type="checkbox"/> Distinguished
<b>Comments:</b>				

<input type="checkbox"/> Unsatisfactory	<input type="checkbox"/> Needs Improvement	<input type="checkbox"/> Meets Expectations	<input type="checkbox"/> Exceeds Expectations	<input type="checkbox"/> Distinguished
<b>Comments:</b>				