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## Evaluating Board Leaders

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## Evaluating Board Leaders

### Abstract

Evaluating the performance of leaders is critical to the development of organizations and communities. Evaluation means measuring performance by defining a set of metrics. But which performance metrics should be used? From a review of the work by Collins (2001), we developed a tool that provides one way to measure the performance of leaders. We apply this to the case of leaders of boards. Clearly defining leader performance expectations is one of the most critical steps a board can take to prevent misunderstandings and therefore hedge against the emergence of unresolved conflict among board members and their respective leader.

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## Introduction

One of the most important aspects of community rural development is working with leaders and providing them with training to strengthen their leadership and decision-making skills. This has long been an interest of Cooperative Extension programs across the U.S. (Langone, 1992).

Board governance training is an example Extension program that can improve the decision-making skills of leaders (Barnes, Haynes, & Woods, 2006). The reason for training board members and their leaders is simple: they make or influence others who make daily decisions about how to allocate scarce resources in communities. As a result, leaders also influence the financial performance of organizations and communities. But we often do not have leadership performance metrics to help establish expectations between a board and its members. And this can lead to conflict about priorities and strategic direction that in many cases can go unresolved.

This article reviews one set of performance standards for board leaders and suggest that board members and leaders complete the questionnaire tool below to begin to refine the performance expectations for board leaders. The tool allows a board chair to evaluate his or her performance. The tool also can be completed by existing board members. In concert, the average score of all board members can be compared to the self-assessed score provided by a board leader. The difference noted from the tool can provide an initial discussion point for improving board

communications among leaders and members to reduce unresolved conflict and the poor performance that follows.

## Level 5 Leadership

We draw from recent research in the leadership literature, citing the work of Collins (2001) as our framework for generating the questionnaire tool. Collins examined the financial performance of companies over a 15-year period and identified top performers based on the characteristics of its leaders. The framework developed was identified as Level 5 (L5) leadership characteristics.

Collins' research points to the importance of L5 leadership characteristics displayed by each Chief Executive Officer (CEO). What is interesting for our purposes here is the leadership characteristics of the CEOs responsible for the superior organizational performance. But what are these characteristics of leader performance?

The idea is a L5 leader is someone who: "builds enduring greatness through a paradoxical blend of personal humility and professional will" (Collins, 2001, p. 20). How do L5 leaders do this? Collins concludes L5 leaders: "channel their ego needs away from themselves and into the larger goal of building a great company. It's not that L5 leaders have no ego or self-interest. Indeed, they are incredibly ambitious—but their ambition is first and foremost for the institution, not themselves" (Collins, 2001, p. 20). Collins also notes L5 leaders have a ferocious resolve or the determination within to do whatever needs to be done to make a company obtain superior performance.

Here are the characteristics suggested by Collins' research that describe L5 leaders. According to Collins (2001), a L5 leader exhibits **professional will** by:

- Creating superb results;
- Demonstrating an unwavering resolve to do difficult work;
- Setting a new standard of excellence for performance;
- Being prepared to give credit to others on the team; and
- Accepting responsibility for failure if the management team fails.

In addition, an L5 leader exhibits **humility** by:

- Demonstrating modesty;
- Never being boastful; and
- Acting with quiet, calm determination to build a great institution for the long-run.

From these eight characteristics, we identify questions that provide board members and their leaders with a tool to establish performance expectations.

## The Tool

The questions below represent one interpretation of how to use the L5 characteristics to measure leader performance. We recognize other interpretations certainly exist. However, the purpose of this article is to provide a performance evaluation tool as a starting point for board members and leaders to use to launch full and open communication about leader performance expectations.

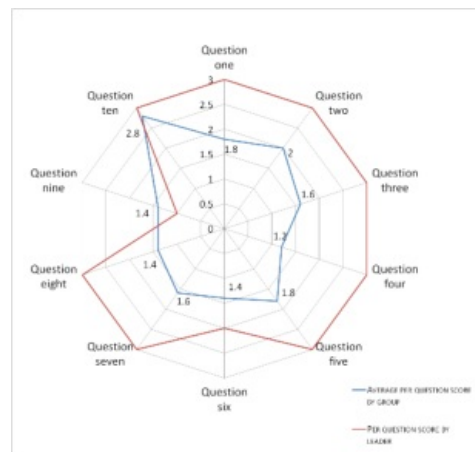
Does your leader demonstrate the ability to:

1. Listen to members of the organization?
2. Create superb results by keeping your board working as an effective team?
3. Utilize good decision making skills?
4. Do difficult work by helping your board stay focused on its agreed to goals and initiatives?
5. Accept board challenges as opportunities?
6. Strive to make the organization outstanding?

7. Acknowledge members for their work?
8. Collaborate with others to expand the work of the organization?
9. Accept responsibility when events don't go as planned?
10. Have the attitude, "it's not about me, it's about the team."

Figure 1 below shows how the tool can be used by a board to evaluate its leader. The first step is to have each board member complete the 10 questions above, scoring each question on a 1-3 scale that represents the frequency of observing his or her L5 abilities; 1, 2, and 3 represent "not that often," "sometimes," and "most of the time," respectively. An average score is then calculated across each question, giving the board an average perspective of leader performance.

**Figure 1.**  
Leader Performance Expectations Tool



The next step is to have the leader complete the same 10 questions. Figure one is a radar graph indicating the difference between leader and the average group member score for each of the 10 questions. The interpretation of Figure 1 is that the board perceives its leader to be much less effective in L5 characteristics than the leader does. Performance expectations are closest for question 10, which means the group believes their leader has a good team attitude. Likewise, the leader also believes he or she has this L5 characteristic. However, the largest gap in performance expectations is question four. The interpretation is that this leader believes he or she has the L5 characteristic of being able to keep the board on track with obtaining its goals and initiatives. The board members disagree. This is an area that should be discussed so that expectations about performance can be resolved.

We developed a Microsoft Excel spreadsheet that contains more on how to use these L5 questions to evaluate board leaders. The spreadsheet is available upon request.

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