



Columinate

Catalysts for Common Good

Discussion and Process Guide for GM Evaluation

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This discussion and process guide is meant to accompany other documents related to General Manager evaluation in the Columinate library. Please reference these documents, and confer with your CBLD consultant where appropriate to devise a system that works for your cooperative. This process is based on the CBLD Policy Template D4 - Evaluating the GM. If your board has a different policy, be sure to follow the policy you have.

Preparing for GM Evaluation Process

Encourage individual board members to take some time considering the biases they may bring to any evaluation process. Perhaps you have had a terrible supervisor in the past, or a great one, or both. Think about how this may influence times when you yourself are called to evaluate someone. Perhaps even take time to think about your individual feelings or relationship to the GM, and set these all aside. Acknowledging these potential biases can mitigate their effects on the evaluation process.

Stress that evaluation and compensation conversations are different, completely divorced processes within the policy and practice of the co-op. This is worth calling out because often, in our own work lives, this is not the case. The GM should not feel the need to exaggerate accomplishments or downplay growth areas as part of the evaluation discussion in order to set themselves up well for a conversation around compensation. The ability to have a frank and honest conversation between the board and GM regarding GM performance is crucial to the success of the co-op.

Review your relevant policies around evaluating the GM, referenced here as D4 - Evaluating the GM, as an entire board. Remember what we said we would do, and why we are doing it this way. If a policy seems outmoded or requires revision, take the time to do so, but remember -- we evaluate past performance only on the rules we made at the beginning, not the end. If revision needs to be made to the policy, note that, then carry on evaluating the GM with the policy you have now. The "no surprises" rule is a key part of evaluation.

Speak with one voice. That's always important in any decision-making the board does, but especially in this role. Part of the reason we review the policy is to see what we said we would



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be evaluating the GM on, and how we would be evaluating. This helps the board speak with one voice on actual GM performance, the importance of evaluation as a part of the board's job, and everything in between.

Evaluating the GM

Review the annual monitoring table¹. While the board is formally reviewing GM performance on an annual basis, in truth the evaluation happens each month when reviewing the monitoring reports. Keeping current an annual monitoring table can help the board remember certain highs and lows throughout the year. Be as detailed as you can in the notes section of this monitoring table, as it will help the board during annual evaluation.

If it's a part of your policy (and in line with the "no surprises" rule), you may want to ask your GM to evaluate themselves in advance of a conversation with the board. You may jointly decide if these questions require a written response, or simply be a prompt in igniting conversation between the board and the GM.

1. What are your priorities for the coming year?
2. What are the challenges facing you in the coming year?
3. What are your professional development goals and how can the board support you?

This can provide for a productive conversation between the board and GM, and in particular have the GM themselves designate areas for improvement, rather than the alternative.

The GM's performance is the same as the cooperative's performance, and vice versa. Note that this does not single out financial performance or any other specific indicator, but rather offers the board a chance to take a holistic view of co-op performance against all the measures set forth in the policy register. How has progress been made against the Ends policies, for example? This equivalence also encourages the board to avoid managing for style, but to evaluate performance based upon clearly set expectations with concrete data points.

Lastly, conclude with a memo to the GM that accompanies the Annual Monitoring Table for the GM's personnel file that provides a clear summary of the outcomes of your process. This memo is an excellent opportunity to share appreciations in what otherwise can be an effective but seemingly lifeless process. Embrace this opportunity to appreciate the GM and voice that appreciation.

¹ <https://columinate.coop/wp-content/uploads/2015/09/CBLD-Annual-Monitoring-Report-check-sheet-template-1.xlsx>