

1. Introduction

The responses of each Board member (ratings and comments) will be compiled with the responses of other Board members and will not be identified by name. The responses of senior staff (if applicable) will be combined with all senior staff responses in a similar manner. The CEO's responses will be separate and identifiable. For each group of respondents, responses will be translated into numerical ratings for each factor and for each category.

As you rate each factor, please consider how the CEO's performance during the past year compares with your expectations of the CEO for that area. The following are the rating options with explanations:

- **Improvement needed:** The CEO's performance in the area being considered generally does not meet your expectations.
- **Meets expectations:** The CEO's performance is very much in line with your expectations.
- **Exceeds expectations:** The CEO's performance is above and beyond what you would normally expect.
- **N/A, Not Applicable:** The question does not apply or you do not have adequate information upon which to base an assessment.

The following sections will be covered in this assessment. At the end of each section there is an opportunity for you to provide any comments that would clarify your assessment.

- Organizational Planning
- Fund Raising / Community Networking
- Partnership with the Board
- Quality/Effectiveness
- Oversight of Programs and Services
- Leadership
- Financial Management
- Interpersonal Skills



2. Organizational Planning

Some form of organizational planning is essential if the organization's mission is to continue. The CEO plays a key role in leading the planning process and in implementing the organization's plan. Based on your expectations, please rate the CEO in the following area:

***1. The CEO ensures that an effective organizational planning process is in place.**

- Improvement needed
- Meets expectations
- Exceeds expectations
- N/A

***2. The CEO adapts the organization's plan as realities change.**

- Improvement needed
- Meets expectations
- Exceeds expectations
- N/A

3. Comments:

3. Partnership with the Board

An effective Board/CEO partnership contributes to a well functioning organization. This relationship is the responsibility of both the Board and the CEO. Based on your expectations, please rate the CEO in the following areas:

***1. The CEO's communication style contributes to a positive working relationship with the board.**

- Improvement needed
- Meets expectations
- Exceeds expectations
- N/A

***2. The CEO communicates clearly about the organization's challenges and opportunities.**

- Improvement needed
- Meets expectations
- Exceeds expectations
- N/A

3. Comments:

4. Oversight of Programs and Services

The CEO must ensure that the organization's programs and services are efficiently and effectively fulfilling the mission of the organization. Based on your expectations, please assess the following aspects of the CEO's oversight of the services provided by the organization:

***1. The CEO recruits, trains and retains qualified staff, including a competent and effective senior management team.**

- Improvement needed
- Meets expectations
- Exceeds expectations
- N/A

***2. The CEO promotes a positive work environment, including appropriate and effective personnel policies and practices.**

- Improvement needed
- Meets expectations
- Exceeds expectations
- N/A

***3. The organization and its services operate efficiently and effectively.**

- Improvement needed
- Meets expectations
- Exceeds expectations
- N/A

4. Comments

5. Financial Management

Understanding the organization's sources of revenue and managing expenses and financial assets are an ongoing challenge for many organizations today. The CEO plays a key role in developing and modifying the organization's business plan. Based on your expectations, please assess the CEO in the following areas related to financial management:

***1. The CEO provides leadership for recognizing and addressing financial challenges in a timely and effective manner.**

- Improvement needed
- Meets expectations
- Exceeds expectations
- N/A

***2. The CEO holds senior leadership accountable for meeting financial goals.**

- Improvement needed
- Meets expectations
- Exceeds expectations
- N/A

***3. The CEO ensures that policies and financial controls are in place to prevent fraud and inappropriate billing practices.**

- Improvement needed
- Meets expectations
- Exceeds expectations
- N/A

4. Comments:

6. Fund Raising and Community Networking

Connecting with stakeholders and having a visible presence in the community are often an important part of the CEO's role. Although some aspects of fund raising may be delegated, successful fund raising initiatives usually include the active involvement of the CEO. Based on your expectations, please assess the CEO in the following areas related to community involvement and fund raising:

*1. The CEO communicates effectively about the organization and its mission.

- Improvement needed
- Meets expectations
- Exceeds expectations
- N/A

*2. The CEO oversees an effective fund raising program which meets the annual goals.

- Improvement needed
- Meets expectations
- Exceeds expectations
- N/A

3. Comments:

7. Quality/Effectiveness

The CEO plays a key role in setting and meeting quality standards. This requires ongoing monitoring and proactive efforts to improve performance. Based on your expectations, please assess the CEO in the following areas:

***1. The CEO makes sure that program quality is monitored and improved as needed.**

- Improvement needed
- Meets expectations
- Exceeds expectations
- N/A

***2. The organization meets or exceeds the standards defined by licensure and regulatory agencies.**

- Improvement needed
- Meets expectations
- Exceeds expectations
- N/A

3. Comments:

8. Leadership

Although leadership styles vary, an effective leader expands the organization's ability to live out its core values as it fulfills its mission. Based on your expectations, please assess the CEO as a leader:

***1. The CEO actively works to support staff in living out the organization's core values.**

- Improvement needed
- Meets expectations
- Exceeds expectations
- N/A

***2. The CEO's words and actions are consistent with the mission and values of the organization.**

- Improvement needed
- Meets expectations
- Exceeds expectations
- N/A

3. Comments:

9. Interpersonal Skills

Self-awareness and the ability to relate well to others are essential for effective leaders. Based on your expectations, please assess the CEO in the following areas:

***1. The CEO invites feedback, listens well and responds non-defensively.**

- Improvement needed
- Meets expectations
- Exceeds expectations
- N/A

***2. The CEO inspires confidence and motivates others to work together toward a common vision.**

- Improvement needed
- Meets expectations
- Exceeds expectations
- N/A

3. The CEO appears to demonstrate appropriate self-care, including a healthy work/life balance.

- Improvement needed
- Meets expectations
- Exceeds expectations
- N/A

4. Comments:

10. Overall Assessment

Please take a minute to step back from the individual areas that you have been considering. The following two questions are intended to assess your overall satisfaction with the CEO's performance and the direction the organization is going.

1. My overall satisfaction with the CEO's performance this past year.

- Not satisfied
- Satisfied
- Very satisfied
- N/A

Comments:

2. My overall satisfaction with the direction the organization is heading.

- Not satisfied
- Satisfied
- Very satisfied
- N/A

Comments:

11. Please comment on the following areas:

1. Identify two important accomplishments of the CEO during the past year:

2. List one or two professional development goals for the CEO:

3. Suggest questions or issues that should be discussed with the CEO:

4. Identify the two most important organizational priorities for the CEO for the coming year:

5. Additional Comments:

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12. Organization Specific Goals (Optional)

Several questions are tailored to rate performance on expectations established by the board.

Sample