



**CHIEF EXECUTIVE EVALUATION/PERFORMANCE
ASSESSMENT TOOL**

SECTION 1: Vision, Mission, and Strategic Planning

The CEO works closely with the Board of Directors and other key stakeholders to develop a shared understanding of the organization’s mission and a vision for its future.

How satisfied are you that the CEO:	Very Satisfied	Satisfied	Unsatisfied	Very Unsatisfied	Not Sure
a) has worked with the Board to develop a clear vision for the organization?					
b) has worked with other key stakeholders to solicit their input regarding the organization’s vision?					
c) has worked with the Board to review the mission and integrate it into realistic goals and objectives?					
d) has worked with the Board Chair to ensure an effective strategic planning process for the organization?					
e) has a sense of what is needed in order to accomplish the organization’s mission and realize its vision?					

What strengths of the CEO do you want to affirm in the area of vision, mission and strategic planning?

In what specific ways can the CEO do a better job in the area of vision, mission and strategic planning?

SECTION 2: *Partnership with the Board*

The CEO contributes significantly to the overall effectiveness of the Board of Directors.

How satisfied are you that the CEO:	Very Satisfied	Satisfied	Unsatisfied	Very Unsatisfied	Not Sure
a) meets or speaks regularly with the Board Chair to prepare agendas?					
b) submits well-prepared agenda materials to Board Members adequately in advance of meetings?					
c) prepares well-reasoned recommendations for Board deliberation and action?					
d) offers Board Members opportunities and resources for ongoing training and education about relevant issues?					
e) requests the input and feedback of ongoing training and education about relevant issues?					
f) shares a clear understanding with the Board of Directors regarding respective roles?					
g) has the necessary Board-delegated authority to allow him/her to effectively manage the organization?					
h) receives a timely annual review that thoughtfully articulates specific strengths and areas for improvement?					
i) has established appropriate circumstances of communication between the Board of Directors and senior staff to ensure that that the Board maintains a good knowledge of the organization?					
j) has a congenial working relationship with the Board of Directors and staff?					

What strengths of the CEO do you want to affirm in the area of his/her partnership with the Board of Directors?

In what specific ways can the CEO do a better job in the area of his/her partnership with the Board of Directors?

SECTION 3: *Achieving Organizational Objectives*

The CEO establishes operational objectives and action plans that support the organization’s strategic plan and leads the staff in strategic plan implementation.

How satisfied are you that the CEO:	Very Satisfied	Satisfied	Unsatisfied	Very Unsatisfied	Not Sure
a) selects and nurtures qualified senior staff?					
b) builds good morale among staff?					
c) models honesty and other important behaviors of a leader of a faith-based organization?					
d) demonstrates competency?					
e) inspires others?					
f) ensures that there are appropriate systems in place to facilitate effective daily operations in the areas of:					
i) program development and delivery?					
ii) policy development?					
iii) administration and operations?					
iv) resource development?					
g) has made progress in accomplishing the personal and organizational management objectives agreed upon during his/her last performance review?					

What strengths of the CEO do you want to affirm in the area of achieving organizational objectives?

In what specific ways can the CEO do a better job in the area of achieving organizational objectives?

SECTION 4: Oversight of Programs and Services

The chief executive leads the staff in managing and administering the organization’s programs and services.

How satisfied are you that the CEO:	Very Satisfied	Satisfied	Unsatisfied	Very Unsatisfied	Not Sure
a) demonstrates substantive knowledge regarding the organization’s programs and services?					
b) works with the Board of Directors to develop appropriate policies – consistent with the organization’s mission and values – to ensure program effectiveness?					
c) uses effective oversight and staffing to set high standards of quality for all programs and services?					
d) recommends new programs, program modifications, or discontinuance of current programs to the Board of Directors?					
e) provides effective supervision for staff members who report directly to him/her?					

What strengths of the CEO do you want to affirm in the area of programs and services oversight?

In what specific ways can the CEO do a better job in the area of programs and services oversight?

SECTION 5: *Financial Resource Development*

How satisfied are you that the CEO:	Very Satisfied	Satisfied	Unsatisfied	Very Unsatisfied	Not Sure
a) has a clear understanding of the current and future financial resources needed to realize the organization's mission?					
b) creates innovative partnerships with other organizations or businesses in ways that enhance the organization's resource base?					
c) guides revenue-generating activities in order to provide adequate income to the organization?					
d) provides appropriate leadership for the development of benevolent resources for the organization?					

What strengths of the CEO do you want to affirm in the area of financial resource development?

In what specific ways can the CEO do a better job in the area of financial resource development?

SECTION 6: *Financial Planning and Management*

The chief executive ensures that the organization’s goals and strategic plan serve as the basis for sound financial planning. He/she also ensures that solid planning and budgeting systems are in place and hires qualified staff to accurately monitor, assess, and manage the financial health of the organization.

How satisfied are you that the CEO:	Very Satisfied	Satisfied	Unsatisfied	Very Unsatisfied	Not Sure
a) has established a system linking strategic and operational planning with the budgeting process?					
b) is knowledgeable regarding financial planning, budgeting and investment management and understands the place of each in ensuring the organization’s overall financial health?					
c) presents regular financial reports to the Board and submits an annual budget for Board review, revision and approval?					
d) ensures that a clear, accurate accounting system is maintained so that the board can monitor the organization’s performance relative to the approved budget and make informed financial decisions?					
e) works with the independent auditing firm to ensure an independent annual audit or audit review?					

What strengths of the CEO do you want to affirm in the area of financial planning and management?

In what specific ways can the CEO do a better job in the area of financial planning and management?

SECTION 7: Oversight of Overall Operations

The chief executive is responsible for the successful day-to-day operation of the organization. He/she works with staff to develop, maintain and use systems and resources to facilitate effective operations, while realizing that degrees of delegation do not release him/her from broad responsibility in this area.

How satisfied are you that the CEO has ensured that the organization has in place?	Very Satisfied	Satisfied	Unsatisfied	Very Unsatisfied	Not Sure
a) sound risk management policies, including adequate insurance coverage?					
b) adequate accounting, payroll, and cash management systems?					
c) appropriate personnel policies and systems for staffing?					
d) appropriate space management plans which help build an efficient and harmonious work place?					
e) plans for the appropriate use of technology?					
f) ensures compliance with all legal and regulatory requirements?					

What strengths of the CEO do you want to affirm in the area of oversight of the organization's overall operations?

In what specific ways can the CEO do a better job in the area of oversight of the organization's overall operations?

SECTION 8: *Serving as External Liaison*

The chief executive and members of the Board of Directors play vital roles in establishing and maintaining positive relationships with the many groups that support the work of the organization.

How satisfied are you that the CEO:	Very Satisfied	Satisfied	Unsatisfied	Very Unsatisfied	Not Sure
a) maintains a positive professional reputation in the community among key constituent groups?					
b) cultivates effective relationships with business leaders, key community members, and relevant professional organizations and/or leaders?					

What strengths of the CEO do you want to affirm in the area of serving as an external liaison for the organization?

In what specific ways can the CEO do a better job in the area of serving as an external liaison for the organization?

SECTION 9: Overall Performance of the Organization

The chief executive is responsible for the overall performance of the organization.

How satisfied are you with the overall performance of the organization in the areas of:	Very Satisfied	Satisfied	Unsatisfied	Very Unsatisfied	Not Sure
a) administration and operations?					
b) program development and delivery?					
c) financial management?					
d) marketing and strategic planning?					
e) long-range and strategic planning?					
f) resource development?					
g) member services?					
h) overall quality of staff performance?					
i) other					

What strengths of the CEO do you want to affirm in the area of the organization’s overall performance?

In what specific ways can the CEO do a better job in the area of the organization’s overall performance?