

Dear Colleagues,

Our Board conducts an annual appraisal of our CEO. Appraisal areas are derived from:

- overall initiatives in our strategic plan
- goals from last year's appraisal and
- generally accepted CEO organizational responsibilities and leadership characteristics.

By November 1, please set aside @10 minutes to fill out this appraisal survey online.

If you feel you do not have enough information or experience to answer a question, please click on the "Unsure" response. That, too, is valuable data to help target Board information needs.

We will review survey results and discuss summary findings and recommendations with the full Board during November. Individual answers will be held in confidence; only summary data is reported.

Thanks for all you do to make Chester County even better, now and forever.

xxxxx, Chair of the Board

xxxxx, Chair of CEO Appraisal Task Force

CEO ASSESSMENT SURVEY

Re: CEO name

ASSESSMENT TIME PERIOD: month year - month year+1

PERCEPTIONS OF CEO

1. What are your perceptions of the general quality of LEADERSHIP & MANAGEMENT the CEO provides in these areas?

	Not Satisfactory	Satisfactory	Very Satisfactory	Unsure
PROGRAM DEVELOPMENT & DELIVERY: plans, organizes, directs, and reviews core programs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
CUSTOMER SERVICE: Assures that needs of constituents are met in a timely, professional manner	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ADMINISTRATION & OPERATIONS: manages daily operations, improves administrative systems & ensures compliance with regulations & laws	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
FISCAL MANAGEMENT: accurate, efficient financial reporting systems are in place; the strategic plan is supported by financial plans; finances are well-managed; & qualified personnel accurately monitor, assess & manage our fiscal health	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
MARKETING & PUBLIC RELATIONS: consistent high-quality communications, inspiring long-term community inclusion	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
VISION, MISSION, STRATEGIC PLAN: enhance understanding of mission & vision & refine goals & strategies to advance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
PERSONNEL: secures, manages and develops competent personnel; hires and fires as necessary; fosters productive working relationships	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
CEO/BOARD PARTNERSHIP: helps the Board meet its legal & fiduciary responsibilities; helps the Board monitor & formulate policy decisions; fosters productive working relationships	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments:

INITIATIVES & GOALS

2. These are overall initiatives from our strategic plan. What is your sense of progress made in the past year?

	Not Satisfactory	Satisfactory	Very Satisfactory	Unsure
Program Goal 1	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Program Goal 2	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Program Goal 3	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Infrastructure Goal 4	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

3. Per the last appraisal, our CEO agreed to these annual goals. What is your sense of the progress made in the past year?

	Little progress made; still in process	Moderate progress made; still in process	Progress made; goal attained	Unsure
Annual goal #1	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Annual goal #2	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Annual goal #3	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments:

CORE VALUES & KEY OPERATING PRINCIPLES

4. The set of desirable attributes for a CEO is extensive. They include: committed ... confident ... creative ... empowering ... inclusive ... inspirational ... integrity ... intelligent ... positive outlook ... productive ... quality mindset ... self-motivated ... solution-oriented ... willing to make the tough calls ... accountable...delivers on time as promised...unflappable/operates well under stress.

	Not Satisfactory	Satisfactory	Very Satisfactory	Unsure
How do you rate our CEO on the key operating values noted above?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments:

5. Please list the CEO's main strengths:

6. Please list where you would like to see the CEO focus increased attention in the coming year:

7. How can the Board better support the CEO?

* 8. Please indicate your affiliation, so we can cross-tab and compare responses of Board compared to Staff. (Everyone takes the same survey, but none can see individual responses.)

9. Thank you! We appreciate your input. We look forward to sharing the summary results with the Board at our zoom meeting.

Thank you for all you do to grow legacy philanthropy. For now and forever.

xxxx, Chair of the Board

xxxx, Chair of CEO Assessment Task Force