

THE CEO EVALUATION

Organization: _____

Date: _____

By: _____

Leadership: The CEO...	Excellent	Good	Satisfactory	Requires Improvement	Unacceptable	N/A
Has clearly defined the basic purpose or mission of the organization.						
Has clearly defined a vision for the organization in the future.						
Has attracted a high-performing senior management team with the knowledge, skills, energy and passion to make the mission and vision a reality.						
Leads a planning process that establishes annual goals, strategies and action plans that are consistent with the vision and mission.						
Leads a performance management process that ensures accountability at all levels of the organization and makes mid-course corrections in goals and strategies as necessary.						
Consistently makes decisions and that enable the organization to achieve its goals better.						
Regularly demonstrates creativity in identifying new opportunities and solving issues that the organization is facing.						
Communicates effectively with internal and external stakeholders to build support for the mission, vision, goals and direction of the organization.						

MANAGEMENT: THE CEO...

Has established an effective organization structure, ensuring that there is management focus on key functions necessary for the organization to deliver on its mission.						
Delegates effectively to members of the senior management team and other staff.						
Clearly articulates priorities and ensures management focus and accountability around addressing priorities						
Solicits feedback from the organization's stakeholders including employees at all levels as input to the direction and operation of the organization.						
Regularly delivers a consistent message to all stakeholders regarding the vision, mission and priorities of the organization.						
Ensures the work of the organization is supported by effective processes for planning, communicating, measuring, governing, delivering quality and providing for a safe work environment.						
Ensures there are clear policies established for how the organization and its employees will operate.						

WORKING WITH THE BOARD: The CEO...

Understands the organization's requirement for governance practices and supports the Board in its governance duties by providing necessary information and access to people.						
Has a strong working relationship with the Board Chair.						
Has a strong working relationship with Board Directors.						
Updates the Board regularly on plans, performance, issues, and opportunities.						
Ensures the Board receives information destined for outside stakeholders before it is communicated to them.						
Helps educate the Board on the organization.						
Executes direction that is provided by the Board of Directors.						
Helps the Board of Directors identify the organization's assets and to ensure that these assets are protected legally and physically from outside threats.						
FINANCIAL MANAGEMENT: The CEO...						
Has a solid, up-to-date understanding of the organization's income statement, balance sheet, cash flow and other financial measures relevant to its business and financial situation.						
Is supported by a qualified and competent CFO or other finance officer who has day to day accountability for managing and monitoring the organization's finances.						
Understands the concept of value creation and makes decisions on where to allocate resources based on maximizing value to the organization.						
Ensures that the organization's financial records are accurate and up to date.						

ACCOMPLISHMENTS

List the CEO's major accomplishments over the past year, then identify the traits/skills the CEO exhibited in making them happen.

Accomplishments	Traits/Skills
1. _____ _____	_____ _____
2. _____ _____	_____ _____
3. _____ _____	_____ _____
4. _____ _____	_____ _____
5. _____ _____	_____ _____

GOALS

List the CEO's key goals for the past year and the status of achievement of each.

Goals	Status
1. _____ _____	_____ _____
2. _____ _____	_____ _____
3. _____ _____	_____ _____
4. _____ _____	_____ _____
5. _____ _____	_____ _____

OPPORTUNITIES TO INCREASE PERFORMANCE

List the areas where the CEO could improve personal performance how those areas could be developed.

Development Opportunities	Resources/Plan
1. _____ _____	_____ _____
2. _____ _____	_____ _____
3. _____ _____	_____ _____
4. _____ _____	_____ _____
5. _____ _____	_____ _____

PERFORMANCE GOALS – UPCOMING YEAR

List the CEO's key goals for the organization in the upcoming year and an outline of how each goal will be accomplished.

Key Goals	Resources/Plan
1. _____ _____	_____ _____
2. _____ _____	_____ _____
3. _____ _____	_____ _____
4. _____ _____	_____ _____
5. _____ _____	_____ _____

CEO's Comments
