

Exhibit D: Page 1

Chief Counsel Performance Evaluation

2024 for Senior Leadership Survey: Link to be provided by email for online input

Legal Oversight

- Regularly and correctly advises the Board, CEO and staff in the application of relevant law to decision making, meeting stated deadlines and organizational needs
- Ensures that benefits are administered impartially, fairly and in accordance with the law
- Minimizes litigation, and skillfully and successfully represents SBCERA's interests in litigation proceedings when needed
- Effectively performs or supervises all legal activities of SBCERA
- Oversees outside counsel work, when appropriate, for tax, fiduciary, investments and personnel matters
- Proactively drafts SBCERA policies, contracts, regulations and legal documents
- Knowledgeably analyzes pending legislation and recommends SBCERA positions on legislation

Comments:

Leadership

- Effectively participates as a member of the senior leadership team of SBCERA to manage activities and strategic direction
- Applies standards of honesty, integrity and trustworthiness to daily work
- Drives a set of common organizational values and interests
- Skilled at directing, persuading and motivating others

Comments:

Communications

- Writes and speaks clearly and effectively
- Participates in communications with County management, other employers that participate in SBCERA, and key stakeholders, such as union representatives
- Professionally represents SBCERA at meetings, conference and events

Comments: