

Exhibit B: Page 1

Chief Counsel Performance Evaluation

2020 Board 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

____ Excellent
____ Good
____ Needs Improvement

Comments:

Board Relations

- Effectively communicates with the Board on a regular basis
- Responds on a timely basis to Board questions, concerns or other inquiries
- Successful onboarding and orientation of new trustees

____ Excellent
____ Good
____ Needs Improvement

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

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- Skilled at directing, persuading and motivating others

_____ Excellent
_____ Good
_____ Needs Improvement

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

_____ Excellent
_____ Good
_____ Needs Improvement

Comments:

Disability Unit Management

- Effectively recommends, formulates and implements operating policies and procedures
- Helps to ensure that staff has the tools and resources to perform their duties
- Implements opportunities to modernize procedures and shorten processing times
- Delivers service to the membership in an accurate, courteous, prompt, professional and cost-effective manner

_____ Excellent
_____ Good
_____ Needs Improvement

Comments: