

Exhibit A: Page 1

Chief Executive Officer Performance Evaluation

Board Survey: Link to be provided by email for online input

Leadership

- Effectively assumes all responsibility for the management of the activities and employees of SBCERA
- Applies standards of honesty, integrity and trustworthiness to daily work
- Drives a set of common organizational values and interests; acts as a catalyst for organizational and cultural change
- Skilled at directing, persuading and motivating others
- Establishes a clear organizational vision based on Board priorities and direction and a sound sense of public service

_____ Excellent
_____ Good
_____ Satisfactory
_____ 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
_____ Satisfactory
_____ Needs Improvement

Comments:

Communications

- Writes and speaks clearly and effectively
- Oversees communications with County management, other employers that participate in SBCERA, and key stakeholders, such as union representatives
- Solicits constructive input from and builds effective relationships with other governmental entities and stakeholders
- Professionally represents SBCERA at meetings, conference and events

_____ Excellent
_____ Good
_____ Satisfactory
_____ Needs Improvement

Comments:

Exhibit A: Page 2

Management

- Effectively recommends, formulates and implements operating policies and procedures
- Plans and makes decisions within SBCERA's values and strategic intent
- Establishes and maintains strong working relationships with the SEIU Local 721 external and internal representatives
- Makes quality hiring decisions by identifying, attracting and retaining talent, and when necessary, decisions to terminate employment
- Effectively oversees the management of key consultants
- Helps to ensure that staff has the tools and resources to perform their duties

_____ Excellent
_____ Good
_____ Satisfactory
_____ Needs Improvement

Comments:

Financial Responsibility

- Oversees the stewardship of SBCERA resources
- Effectively manages the efficient and effective use of financial resources
- Provides oversight in the preparation and administration of the annual budget
- Uses available resources such as personnel, time, materials, equipment and facilities in an effective manner
- Directs the negotiation of contracts and agreements on behalf of SBCERA in a fiscally prudent manner

_____ Excellent
_____ Good
_____ Satisfactory
_____ Needs Improvement

Comments:

Overall

- Strategically plans for the future
- Brings new ideas and direction
- Delivers service to the membership in an accurate, courteous, prompt, professional and cost-effective manner
- Assumes personal responsibility and accountability
- Acts consistently with organizational values
- Personifies high standards of honesty, integrity, trust, openness, fairness, compassion and ethical behavior through a personal set of core values
- Manages and mitigates operational, financial and litigation risk

_____ Excellent
_____ Good
_____ Satisfactory
_____ Needs Improvement

Comments: