

CEO Appraisal Process

Elements of the performance appraisal process

An effective CEO evaluation process looks backward, focusing on accountability and rewards for past performance, as well as forward, focusing on future objectives and whether the CEO has the vision, strategy, and personal capabilities to achieve those objectives. The key dimensions for CEO measurement are:

1. Bottom-line impact
2. Operational impact
3. Leadership effectiveness

The review should include:

- Accomplishment of goals for the review period
- Performance on key responsibilities in the job description
- Goals for upcoming review period
- Performance improvement plan, with monitored target dates as needed
- Development plan that is set jointly, and includes monitored target dates

Ratings

EE, ME, NI. When using NI, please give specific example(s) below the goal statement.

- Exceeds expectations

The CEO is making an exceptional, significant contribution to the organization. This person constantly accepts responsibilities beyond those of the job held and continuously exceeds expectations regarding completion of work assignments. There are few areas regarding performance of job responsibilities in which she could improve.

- Meets expectations

The CEO is a steady, consistent, dependable performer and carries out duties in a fully responsible and effective manner. Meets and occasionally exceeds expectations regarding job responsibilities and completion of work assignments. Even though present performance is acceptable, there may be areas regarding performance of job responsibilities in which the person should improve.

- Needs improvement

The CEO falls below standards or expectations. It is expected that with the appropriate improvement plan, performance will reach a fully satisfactory level within a specified time period.

CEO name: _____

Reviewer name: _____

Previous evaluation date _____

Current evaluation period _____

Date evaluation completed _____

Section 1: Achievement of goals from last review period

N/A

Section 2

Performance on key responsibilities

	Rating
Mission, policy, planning	
Determines values, mission, vision and goals.	
Monitors and evaluates organization's relevancy, effectiveness, and results.	
Keeps informed of developments in the organization's sector & general business management.	
Assures that appropriate policies & procedures are in place to guide the organization's work in all areas.	
Strategic alignment	
Executes short and long-term strategic initiatives.	
Balances attention on long-range strategic issues.	
Measures attainment of objectives against goals.	
Management & administration	
Provides general oversight of all activities, manages day-to-day operations, and assures a smoothly functioning, efficient organization.	
Creates a working environment that recruits, retains and supports quality staff.	
Assures a process for selecting, developing, motivating, and evaluating staff.	
Recruits personnel, negotiates professional contracts, and assures development and maintenance of appropriate salary & reward structures.	
Specifies responsibilities and accountabilities for personnel; evaluates performance regularly.	
Maintains a current crisis management plan and exhibits the behaviors of the CEO in times of crisis.	
Finance	
Oversees the fiscal activities of the organization, assures adequate controls.	
Ensures financing to support goals.	
Monitors KPI's and financial measures and is proactive in initiating corrective and/or value-building activities.	
Sustainability	
Plans and executes long-term plans and actions to enable business to grow and thrive, encompassing external and internal factors.	
Leadership	
Demonstrates initiative and creativity in identifying and addressing strategic issues facing the organization.	
Effectively manages continuity, change and transition.	
Sets and achieves clear and measurable goals and reasonable deadlines.	
Deals effectively with demanding situations and designs and implements effective interventions.	

Consistently displays integrity and models the organization's values.	
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Section 3

Performance factors

This section focuses on values that all employees are expected to demonstrate, and which the CEO should model, as well as competencies and behaviors that are key to the ED position in particular.

<i>Core Values</i>	<i>Rating</i>
Persistence <ul style="list-style-type: none"> • Finds ways around obstacles and tries new approaches to get the job done 	
Continuous improvement <ul style="list-style-type: none"> • Constantly learns from and improves in his or her work 	
Decency <ul style="list-style-type: none"> • Treats others as he or she would want to be treated. 	
Humility <ul style="list-style-type: none"> • Acknowledges what he or she does not know and approaches others with deep respect for the difficulty of their work. 	
Integrity <ul style="list-style-type: none"> • Aligns his or her actions with his or her words and operates with transparency. 	
Understanding of and commitment to [ORG's] mission <ul style="list-style-type: none"> • Strong commitment to organizational values and mission. 	
<i>CEO-Specific Competencies</i>	<i>Rating</i>
Setting a vision for the Business <ul style="list-style-type: none"> • Ensures we adopt a clear, compelling vision for what the organization will accomplish and how. • Builds commitment of management and staff to the vision. • Ensure we adapt our vision to meet changing circumstances. 	
Managing execution <ul style="list-style-type: none"> • Spurs creation of well thought-through plans for implementing work. • Ensures what happens on the ground actually reflects our plans. 	
Building a strong organization <ul style="list-style-type: none"> • Ensures the business has the staffing it needs to reach its short- and longer-term goals. • Ensures the business works to retain top performers and is committed to letting low performers go quickly. • Ensures the business has a strong culture of performance and learning. 	
External communication and relationship-building <ul style="list-style-type: none"> • Builds and cultivates important high-level strategic relationships. • Raises the business' visibility within our broader movement and elsewhere. • Garner respect for the business and its work. 	

Section 4
Goals for Next Period & Personal Development Goals

<i>Agreed Action</i>	<i>Time-scale</i>
1	
2	
3	
4	
5	
6	