



# Chief Executive Officer Performance Evaluation

## Instructions

Each section begins with a brief description of an important area of responsibility. Please read it and then answer the questions that follow. The questions measure your level of satisfaction with how the Chief Executive is carrying out various aspects of each responsibility.

Circle the number representing the degree to which you are satisfied or not satisfied with the Chief Executive’s performance in each responsibility mentioned. The answer you mark can range on a scale of 1 to 4, with 1 representing “Very Dissatisfied” and 4 representing “Very Satisfied.” You also have the option of answering “Not Sure.” If you think a particular question is not applicable, feel free to skip it.

- 1 - Very Dissatisfied
- 2 - Dissatisfied
- 3 - Satisfied
- 4 - Very Satisfied
- NS - Not Sure

At the end of each section and at the conclusion of the assessment are a number of open-ended questions. Please take the time to answer these questions, since your responses will be especially helpful when the Board and Chief Executive look for ways to strengthen the executive’s performance and the organization as a whole.

## 1. Vision, Mission, and Strategies

*The Chief Executive’s role has both strategic and operational components. Working with the Broward Behavioral Health Coalition board, the Chief Executive must develop a shared vision for the future of the organization, build understanding around the current mission, and develop appropriate goals and strategies to advance that mission*

- 1–1 The Chief Executive has worked with the board to develop a clear vision for the organization and understands his or her own leadership role.
- |   |   |   |   |    |
|---|---|---|---|----|
| 1 | 2 | 3 | 4 | NS |
|---|---|---|---|----|
- 1–2 The Chief Executive, working with the Board, translates the organization’s mission into realistic goals and objectives.
- |   |   |   |   |    |
|---|---|---|---|----|
| 1 | 2 | 3 | 4 | NS |
|---|---|---|---|----|
- 1–3 With input from the Board and staff, the Chief Executive has created an effective process for long-range or strategic planning for the organization.
- |   |   |   |   |    |
|---|---|---|---|----|
| 1 | 2 | 3 | 4 | NS |
|---|---|---|---|----|

1-4 The Chief Executive has a sense of what must change and what must remain the same in order to accomplish the organization's mission and realize its vision.

1	2	3	4	NS
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Total for this area \_\_\_\_\_

What are the major strengths of the Chief Executive in this area?

How can the Chief Executive do better in this area?

## 2. Accomplishment of Management Objectives

*Working with the Board, the Chief Executive establishes operational objectives that support the strategic plan. The Chief Executive is responsible for leading the staff in the implementation of the strategic plan and any annual plans.*

2-1 The Chief Executive selects and cultivates qualified senior staff, models effective behaviors and skills, and builds morale among staff and volunteers.

1	2	3	4	NS
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2-2 The Chief Executive ensures that there are appropriate systems in place to facilitate the day-to-day operations of the organization in the areas of:

1. development, delivery and monitoring of services, programs and organizations education, outreach and technical assistance;
2. policy development;
3. administration and operations; and
4. grant writing and resource development.

1	2	3	4	NS
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2-3 The Chief Executive has made progress in accomplishing the personal and organizational management objectives established by the Board.

1	2	3	4	NS
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Total for this area \_\_\_\_\_

What are the major strengths of the Chief Executive in this area?

How can the Chief Executive improve in this area?

### 3. Provider and Network Management

*Broward Behavioral Health Coalition carries out its mission by providing for specific programs and services through its network of providers. The Chief Executive leads the staff in evaluating and monitoring the effectiveness of these programs and services with data and outcomes. This requires a thorough knowledge of the behavioral health system in Broward County area as well as an understanding of technical, operational, and ethical issues.*

- |     |                                                                                                                                                                                           |   |   |   |   |    |
|-----|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|---|---|---|----|
| 3-1 | The Chief Executive demonstrates substantive knowledge regarding the organization's services and network of providers.                                                                    | 1 | 2 | 3 | 4 | NS |
| 3-2 | The Chief Executive works with the Board to develop appropriate policies to ensure the efficiency and effectiveness of services/programs.                                                 | 1 | 2 | 3 | 4 | NS |
| 3-3 | The Chief Executive ensures that staff monitors and evaluate these programs effectively utilizing data and outcomes.                                                                      | 1 | 2 | 3 | 4 | NS |
| 3-4 | The Chief Executive, through effective oversight and staffing, sets high standards of quality for the organization's services/programs.                                                   | 1 | 2 | 3 | 4 | NS |
| 3-5 | The Chief Executive recommends new services and programs and the modification or discontinuance of services and programs that are not operating effectively or meeting quality standards. | 1 | 2 | 3 | 4 | NS |

Total for this area \_\_\_\_\_

What are the major strengths of the Chief Executive in this area?

How can the Chief Executive improve in this area?

### 4. Effectiveness in Grant Writing and Resource Development

*The Chief Executive, in partnership with the board and appropriate staff, is responsible for developing appropriate grant proposals and implementing appropriate resource development.*

- |     |                                                                                                                                                                                                      |   |   |   |   |    |
|-----|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|---|---|---|----|
| 4-1 | The Chief Executive has a clear understanding of the current and future financial resources needed to realize the organization's mission.                                                            | 1 | 2 | 3 | 4 | NS |
| 4-2 | Working in concert with the Board, the community and staff, the Chief Executive seeks community collaboration that meets the goals established for the organization for resource development.        | 1 | 2 | 3 | 4 | NS |
| 4-3 | The Chief Executive is innovative in the creation of partnerships with providers, other funders, the community, advocates and consumers that contribute to the organization's resources development. | 1 | 2 | 3 | 4 | NS |
| 4-4 | The Chief Executive guides revenue generating activities in order to provide adequate income to the organization.                                                                                    | 1 | 2 | 3 | 4 | NS |

Total for this area \_\_\_\_\_

What are the major strengths of the Chief Executive in this area?

How can the Chief Executive improve in this area?

## 5. Fiscal Management

*Ensuring that revenue is managed wisely is especially critical for the Broward Behavioral Health Coalition operating in the public trust. It is the role of the Chief Executive to see that solid planning and budgeting systems are in place and that the organization's goals and strategic plan serve as the basis for sound financial planning. In addition, it is the Chief Executive's responsibility to ensure that qualified staff is hired to accurately monitor, assess, and manage the financial health of the organization.*

5-1 The Chief Executive is knowledgeable regarding financial planning, budgeting, management of the organization's revenue and grants, and understands the place of each in the organization's overall financial picture.

1                      2                      3                      4                      NS

5-2 The Chief Executive has established a system linking strategic and operational planning with the organization's budgeting process.

1                      2                      3                      4                      NS

5-3 The Chief Executive presents financial reports to the board through the Board's Finance Committee on a regular basis and submits an annual budget for Board review, revision, and approval.

1                      2                      3                      4                      NS

5-4 The Chief Executive ensures that a clear and accurate accounting system is maintained, allowing the Board to monitor the organization's finances and operations in relationship to the approved budget and to make informed financial decisions.

1                      2                      3                      4                      NS

Total for this area \_\_\_\_\_

What are the major strengths of the Chief Executive in this area?

How can the Chief Executive improve in this area?

## 6. Operations Management

*The Chief Executive is responsible for day-to-day management. The Chief Executive works with staff to develop, maintain, and use the systems and resources that facilitate the effective operation of the organization*

6-1 The Chief Executive is knowledgeable regarding the operations of an effective office environment.

1                      2                      3                      4                      NS

6-2 The Chief Executive has assured the organization has in place:

1. sound risk management policies, including adequate insurance coverage;
2. accounting, payroll, and cash management systems;
3. appropriate personnel policies and systems for staffing;
4. appropriate space management plans, which help build an efficient and harmonious work place; and
5. plans for the appropriate use of technology.

1                      2                      3                      4                      NS

6-3 The Chief Executive ensures compliance with all local, state and federal regulatory requirements

1                      2                      3                      4                      NS

Total for this area \_\_\_\_\_

What are the major strengths of the Chief Executive in this area?

How can the Chief Executive improve in this area?

## 7. The Chief Executive/Board Partnership

*The Chief Executive and the Broward Behavioral Health Coalition Board must work together as partners. Each draws upon its own unique strengths and abilities. The Chief Executive and the Board have joint responsibility for developing and maintaining a strong working relationship and a system for sharing information. The Board is responsible for creating a written job description for the Chief Executive that is clear and agreed to by all parties*

7-1	The Chief Executive and the Board are clear about the differences between their respective roles.	1	2	3	4	NS
7-2	The Chief Executive is treated as a respected professional by members of the Board.	1	2	3	4	NS
7-3	The Chief Executive has been delegated the authority necessary to manage the organization effectively.	1	2	3	4	NS
7-4	The Chief Executive raises issues and questions and provides adequate information to inform board discussions.	1	2	3	4	NS
7-5	The Chief Executive clearly communicates issues that are understood and enhance board decisions.	1	2	3	4	NS
7-6	The Chief Executive receives the annual review to which he or she is entitled in a timely and thoughtful way that articulates specific strengths and areas for improvement.	1	2	3	4	NS

Total for this area \_\_\_\_\_

What are the major strengths of the Chief Executive in this area?

How can the Chief Executive improve in this area?

## 8. The Board/Staff Relationship

*Because many organizational issues require a partnership of Board and staff to be addressed effectively, the Chief Executive should work to create opportunities for senior staff to interact with board members and to ensure that the Board and staff have a good working relationship.*

8-1 The Chief Executive has established appropriate systems for dialogue and communication between the Board and staff to ensure that the Board maintains a good knowledge of the organization, its providers and network.

1                      2                      3                      4                      NS

8-2 The Chief Executive and senior staff have built effective working relationships with the officers of the Board and committee chairs who are responsible for specific aspects of organizational governance.

1                      2                      3                      4                      NS

8-3 The working relationships among the Chief Executive, staff, and Board are collegial

1                      2                      3                      4                      NS

Total for this area \_\_\_\_\_

What are the major strengths of the chief executive in this area?

How can the chief executive improve in this area?

## 9. External Liaison and Public Image

*The Chief Executive and board members are key players in establishing and maintaining positive relationships with the many groups that support the work of the Broward Behavioral Health Coalition.*

9-1 The Chief Executive maintains a positive professional reputation in the local community with providers, family members, advocates, consumers and other funders.

1                      2                      3                      4                      NS



- 9-2 The Chief Executive cultivates effective relationships with:
1. community leaders;
  2. constituents;
  3. public officials;
  4. relevant professional organizations; and
  5. other local and state funders.

1                      2                      3                      4                      NS

- 9-3 The Chief Executive is an articulate and knowledgeable spokesperson.

1                      2                      3                      4                      NS

- 9-4 The Chief Executive is well regarded by his or her professional peers in the behavioral health community.

1                      2                      3                      4                      NS

Total for this area \_\_\_\_\_

What are the major strengths of the chief executive in this area?

How can the chief executive improve in this area?

## 10. Executive Committee Perceptions of the Organization

*As the Executive Committee of the Broward Behavioral Health Coalition Board reviews the performance of the Chief Executive, it should also gauge its perceptions of the general operations and quality of the organization in the following areas:*

- |                                         |   |   |   |   |    |
|-----------------------------------------|---|---|---|---|----|
| 1. Administration and Operations        | 1 | 2 | 3 | 4 | NS |
| 2. Program Development and Delivery     | 1 | 2 | 3 | 4 | NS |
| 3. Financial Management                 | 1 | 2 | 3 | 4 | NS |
| 4. Marketing and Public Relations       | 1 | 2 | 3 | 4 | NS |
| 5. Long-Range and Strategic Planning    | 1 | 2 | 3 | 4 | NS |
| 6. Client Services                      | 1 | 2 | 3 | 4 | NS |
| 7. Overall Quality of Staff Performance | 1 | 2 | 3 | 4 | NS |
| 8. Other: _____                         | 1 | 2 | 3 | 4 | NS |

Total for this area \_\_\_\_\_

Additional Comments:

## 11. Open-Ended Questions

- 11-1 What are the three major strengths of the Chief Executive?
- 11-2 What are some areas in the Chief Executive's performance that require improvement?
- 11-3 What have been the most significant achievements of the Chief Executive over the last year?
- 11-4 What external factors have influenced the Chief Executive's performance?
- 11-5 In the last year, what difficult issues have faced the organization, and how did the Chief Executive bring them to resolution?
- 11-6 Have any legal or ethical issues arisen with regard to the operations of the organization? How were these brought to successful resolution?
- 11-7 What are areas in which the Board could provide better support to the Chief Executive?
- 11-8 Additional comments:

**Overall Rating** \_\_\_\_\_ (total for all areas 1-11 combined)