

# CIO Management/Leadership Survey 2024 - Fed

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## Chief Investment Officer Survey

### INSTRUCTIONS

1. You may complete the survey in multiple sittings. To save your progress, click the "Save and continue later" link at the top of the page, as illustrated below.



Save and continue later ▼

2. Once you click on the "Save and continue later" link, a message will display confirming your saved progress and you may exit the browser. Your responses from the previous pages will be saved, but any responses on the current page will not be saved. It is therefore best to save your progress only after completing a page.
3. To continue from your saved session, click on the access link provided in the invitation email that was initially used to access the survey.
4. At the conclusion of the survey, a "Review your Responses" page will display all your responses for your review. You may go back to correct your responses by clicking "Back" (this will not affect your responses to other questions).
5. Once you are satisfied with your responses, you may submit your responses by clicking "Submit".

If you have any questions concerning the survey, please contact Valter Viola below.

Thank you,

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## Chief Investment Officer Survey

This survey consists of three pages:

- 14 questions
- 3 open-ended questions

The CIO:

	Needs Improvement	Meets Expectations	Exceeds Expectations	Unable to Assess
1. Effectively represents and promotes the interests of the retirement system to stakeholders (e.g., City Council), maintaining their trust and confidence.	( )	( )	( )	( )
2. Works effectively with the Mayor's Office, City Council, and City Administration, as well as the media and general public.	( )	( )	( )	( )
3. Demonstrates a strong service orientation towards the membership.	( )	( )	( )	( )
4. Keeps the Board properly informed of all relevant matters, and supports the Board to ensure Board meetings are efficient and effective.	( )	( )	( )	( )

5. Provides sound recommendations or guidance to the Board/committees regarding board policy matters and decisions (e.g., identifying and analyzing issues with well-supported recommendations).	( )	( )	( )	( )
6. Is responsive to questions/concerns of board members and welcomes their feedback (e.g., suggestions, new ideas, and constructive criticism).	( )	( )	( )	( )
7. Effectively monitors trends in the environment (e.g., the City, pension industry, etc.) that may have a significant impact on the Systems.	( )	( )	( )	( )

**The CIO:**

8. Demonstrates: (A) Appropriate leadership and oversight of the investment function; and	( )	( )	( )	( )
(B) Sufficient technical and professional knowledge of investments.	( )	( )	( )	( )
9. Develops and recommends an appropriate operating budget, including the effective and efficient use of consultants and other service providers.	( )	( )	( )	( )
10. Works effectively with senior management, and promotes staff satisfaction, development, and recognition of all staff.	( )	( )	( )	( )
11. Demonstrates a high degree of personal integrity, ethics, and decorum.	( )	( )	( )	( )
12. Demonstrates good judgment in his/her actions, decisions, and communications.	( )	( )	( )	( )
13. Articulates a clear and appropriate strategy and direction for the investment program.	( )	( )	( )	( )
14. Communicates effectively in oral reports, presentations, and other communications.	( )	( )	( )	( )

**15. Please elaborate on any of the scores you provided above:**

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**16. Please elaborate on any areas where you believe the CIO is particularly strong:**

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**17. Please elaborate on any areas where you believe the CIO could improve:**

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**Review your Responses**

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**Thank You**