

# CEO Management/Leadership Survey 2026

---

## The CEO:

	<b>Outstanding</b>	<b>Commendable</b>	<b>Satisfactory</b>	<b>Needs Improvement</b>	<b>Unable to Access</b>
1. Acts as a strong representative and advocate of the retirement system to stakeholders (e.g., City Council), maintaining their trust and confidence..	( )	( )	( )	( )	( )
2. Develops relationships with stakeholders and provides relevant and timely information that can affect the System.	( )	( )	( )	( )	( )
3. Demonstrates a strong service orientation towards the membership.	( )	( )	( )	( )	( )
4. Monitors the need for Board educational sessions on relevant and timely pension/industry topics.	( )	( )	( )	( )	( )
5. Ensures that new and existing trustees are informed of fiduciary responsibilities.	( )	( )	( )	( )	( )
6. Keeps the Board timely informed of all relevant matters, and supports the Board to ensure Board meetings are efficient and effective.	( )	( )	( )	( )	( )

	<b>Outstanding</b>	<b>Commendable</b>	<b>Satisfactory</b>	<b>Needs Improvement</b>	<b>Unable to Access</b>
7. 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).	( )	( )	( )	( )	( )
8. Responds promptly to Board inquiries or comments and invites feedback; encourages open communication and Board perspective. .	( )	( )	( )	( )	( )
9. Stays current on relevant industry topics and conveys trends to the Board	( )	( )	( )	( )	( )
10. Demonstrates technical and professional knowledge of: (A) All facets of public plan administration to effectively lead and oversee benefit administration, the actuarial function, etc.; and	( )	( )	( )	( )	( )
(B) Relevant ordinances, laws and Board policies.	( )	( )	( )	( )	( )
11. Develops and recommends an appropriate operating budget, including the effective and efficient use of consultants and other service providers.	( )	( )	( )	( )	( )
12. Operates within budgetary guidelines and informs the Board regularly and promptly regarding costs and potential budgetary amendments.	( )	( )	( )	( )	( )

	<b>Outstanding</b>	<b>Commendable</b>	<b>Satisfactory</b>	<b>Needs Improvement</b>	<b>Unable to Access</b>
13. Models a positive office morale by being present, working effectively with senior management, promoting staff satisfaction, development, and recognizing all staff.	( )	( )	( )	( )	( )
14. Conveys confidence to the Board that he understands the needs of staff and day to day management of the ORS.	( )	( )	( )	( )	( )
15. Demonstrates a high degree of personal integrity, ethics, and decorum.	( )	( )	( )	( )	( )
16. Is aware of the ORS image and always represents ORS with professionalism.	( )	( )	( )	( )	( )
17. Routinely demonstrates good judgment in his actions, decisions, and communications.	( )	( )	( )	( )	( )
18. Makes sure that the Board is aligned with its fiduciary role.	( )	( )	( )	( )	( )
19. Provides the Board with the information and guidance so as to make sound decisions.	( )	( )	( )	( )	( )
20. Articulates a clear and strategic strategy and direction for the organization.	( )	( )	( )	( )	( )
21. Speaks and writes clearly and concisely, using understandable terminology.	( )	( )	( )	( )	( )

	<b>Outstanding</b>	<b>Commendable</b>	<b>Satisfactory</b>	<b>Needs Improvement</b>	<b>Unable to Access</b>
22. Is a leader who actively forecasts trends, responds to change and invites continual improvement.	( )	( )	( )	( )	( )

23. Would you like to add any explanation for any score above?

---

24. Where you believe the CEO demonstrates strength:

---

25. Where do you believe the CEO could demonstrate improvement:

---