CIO Management/Leadership Survey 2026 - Fed

Chief Investment Officer Survey

This survey consists of three pages:

The CIO:

	Outstanding	**Commendable**	**Satisfactory**	**Needs Improvement**	**Unable to Access**
1. Effectively represents and promotes the interests of the retirement system to stakeholders (e.g., City Council), maintaining their trust and confidence.	( )	( )	( )	( )	( )
2. The CIO demonstrates a calm, professional, and respectful demeanor in interactions with staff, even during periods of stress or disagreement.	( )	( )	( )	( )	( )
3. The CIO listens attentively and allows others to fully express perspectives without interruption or dismissal.	( )	( )	( )	( )	( )
4. Informs the Board of his regular review of the portfolio risk of the investment program.	( )	( )	( )	( )	( )
5. Organizes ideas logically, speaks and writes clearly and concisely, using	( )	( )	( )	( )	( )

	Outstanding	**Commendable**	**Satisfactory**	**Needs Improvement**	**Unable to Access**
understandable terminology.					
6. Provides sound recommendations or guidance to the Board/ committees regarding board investment policy matters and decisions (e.g., identifying and analyzing issues with well-supported recommendations).	( )	( )	( )	( )	( )
7. Is responsive to questions/concerns of board members and welcomes their feedback (e.g., suggestions, new ideas, and constructive criticism).	( )	( )	( )	( )	( )
8. Stays current on relevant industry topics and conveys trends to the Board.	( )	( )	( )	( )	( )
9. Articulates a clear and appropriate strategy and direction for the investment program.	( )	( )	( )	( )	( )

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

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