

## Memo

### **CIO and CEO Management & Leadership Surveys-Redlined Drafts for Committee Consideration**

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Date: March 24, 2026

To: San Jose Retirement Boards of Administration Joint Personnel Committee

From: Julie Becker, Partner, Aon Fiduciary Services Practice Leader  
Benita Harper, Associate Partner, Aon Fiduciary Services Practice

cc: John Flynn, Chief Executive Officer

This memo accompanies two management and leadership surveys that are being presented to the Committee for review and consideration:

- San Jose CIO Survey Management Leadership Survey – Shortened version
- San Jose CEO Management Leadership Survey

Both documents are provided in redlined form to clearly highlight suggested changes from prior versions. The redlines are intended to be recommendations, not final decisions, and are presented for Committee discussion, refinement, and direction.

The redlined text reflects proposed edits to wording, structure, or emphasis. The suggested changes are designed to improve clarity, alignment with fiduciary oversight responsibilities, and consistency across executive evaluations.

The CEO Survey is designed as a comprehensive management and leadership evaluation tool, reflecting the CEO's broad organizational, fiduciary, and strategic responsibilities.

The CIO Survey (Short Version) is intentionally streamlined, due to the new CIO's recent appointment.