

CEO Management/Leadership Survey

2026

The CEO:

	<u>Needs Improvement</u> <u>Outstanding</u>	<u>Meets Expectations</u> <u>Commendable</u>	<u>Exceeds Expectations</u> <u>Satisfactory</u>	<u>Needs Improvement</u>	<u>Unable to Assess</u> <u>Unable to Access</u>
1. <u>Acts as a strong representative and advocate of the retirement system to stakeholders (e.g., City Council), maintaining their trust and confidence. Effectively represents and promotes the interests of the retirement system to stakeholders (e.g., City Council), maintaining their trust and confidence.</u>	()	()	()	()	()
2. <u>Develops relationships with stakeholders and provides relevant and timely information that can affect the System. investment program. Works effectively with the Mayor's office, City Council, and City Administration, as well as the media and general public.</u>	()	()	()	()	()
3. <u>Demonstrates a strong service orientation towards the membership.</u>	()	()	()	()	()
4. <u>Monitors the need for Board educational sessions on relevant and timely pension/industry investment topics.</u>	()	()	()	()	()

	<u>Needs Improvement</u> <u>Outstanding</u>	<u>Meets Expectations</u> <u>Commendable</u>	<u>Exceeds Expectations</u> <u>Satisfactory</u>	<u>Needs Improvement</u>	<u>Unable to Assess</u> <u>Unable to Assess</u>
<u>5. Ensures that new and existing trustees are informed of fiduciary responsibilities.</u>	<u>()</u>	<u>()</u>	<u>()</u>	<u>()</u>	<u>()</u>
<u>4-6. -Keeps the Board properly-timely informed of all relevant matters, and supports the Board to ensure Board meetings are efficient and effective.</u>	<u>()</u>	<u>()</u>	<u>()</u>	<u>()</u>	<u>()</u>
<u>57. 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).</u>	<u>()</u>	<u>()</u>	<u>()</u>	<u>()</u>	<u>()</u>
<u>68. -Responds promptly to Board inquiries or comments and invites feedback; encourages open communication and Board perspective. -Is responsive to questions/concerns of board members and welcomes their feedback (e.g., suggestions, new ideas, and constructive criticism).</u>	<u>()</u>	<u>()</u>	<u>()</u>	<u>()</u>	<u>()</u>
<u>7-9. - Stays current on relevant industry topics and conveys trends to the Board Effectively monitors trends in the environment (e.g., the City, pension industry, etc.) that may have a significant impact on the Systems.</u>	<u>()</u>	<u>()</u>	<u>()</u>	<u>()</u>	<u>()</u>

	<u>Needs Improvement</u> Outstanding	<u>Meets Expectations</u> C <u>ommendable</u>	<u>Exceeds Expectations</u> Satisfactory <u>Y</u>	<u>Needs Improvement</u>	<u>Unable to Assess</u> Unable to Assess
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) Public plan investments to effectively lead and oversee the investment program and the work of the CIO.	○	○	○	○	○
(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.	○	○	○	○	○
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.	○	○	○	○	○

	<u>Needs Improvement</u> <u>Outstanding</u>	<u>Meets Expectations</u> <u>Commendable</u>	<u>Exceeds Expectations</u> <u>Satisfactory</u>	<u>Needs Improvement</u>	<u>Unable to Assess</u> <u>Unable to Assess</u>
<u>15. Demonstrates a high degree of personal integrity, ethics, and decorum.</u>	☐	☐	☐	☐	☐
<u>16. Is aware of the ORS image and always represents ORS with professionalism.</u>	☐	☐	☐	☐	☐
<u>17. Routinely demonstrates good judgment in his actions, decisions, and communications.</u>	☐	☐	☐	☐	☐
<u>18. Makes sure that the Board is aligned with its fiduciary role.</u>	☐	☐	☐	☐	☐
<u>19. Provides the Board with the information and guidance so as to make sound decisions.</u>	☐	☐	☐	☐	☐
<u>20. Articulates a clear and strategic strategy and direction for the organization.</u>	☐	☐	☐	☐	☐
<u>21. Speaks and writes clearly and concisely, using understandable terminology.</u>	☐	☐	☐	☐	☐
<u>22. Is a leader who actively forecasts trends, responds to change and invites continual improvement.</u>	☐	☐	☐	☐	☐

The CEO:

	Needs Improvement	Meets Expectations	Exceeds Expectations	Unable to Assess
8. 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) Public plan investments to effectively lead and oversee the investment program and the work of the CIO.	(+)	(+)	(+)	(+)
<u>(C) Relevant ordinances, laws and Board policies.</u>				
9. Develops and recommends an appropriate operating budget, including the effective and efficient use of consultants and other service providers.	(+)	(+)	(+)	(+)
<u>Operates within budgetary guidelines and informs the Board regularly and promptly regarding costs and potential budgetary amendments.</u>				

10. <u>Models a positive office morale by being present, Works effectively with senior management, and promotes staff satisfaction, development, and recognizing of all staff.</u>	⊖	⊖	⊖	⊖
<u>Conveys confidence to the Board that he understands the needs of staff and day to day management of the ORS.</u>				
11. <u>Demonstrates a high degree of personal integrity, ethics, and decorum.</u>	⊖	⊖	⊖	⊖
<u>Is aware of the ORS image and always represents ORS with professionalism.</u>				
12. <u>Routinely demonstrates good judgment in his/her actions, decisions, and communications.</u>	⊖	⊖	⊖	⊖
<u>Makes sure that the Board is aligned with its fiduciary role.</u>				
<u>Provides the Board with the information and guidance so as to make sound decisions.</u>				

13. Articulates a clear and strategic appropriate strategy and direction for the organization.	⊖	⊖	⊖	⊖
14. Communicates effectively in oral reports, presentations, and other communications. <u>Speaks and writes clearly and concisely, using understandable terminology.</u>	⊖	⊖	⊖	⊖
<u>Is a leader who actively forecasts trends, responds to change and invites innovation.</u>				

~~1523. Please elaborate on any of the scores you provided above:~~ Would you like to add any explanation for any score above?

~~1624. Please elaborate on any areas w~~ Where you believe the CEO ~~is particularly~~ demonstrates ~~strengthening~~:

~~1725. Please elaborate on any areas where~~ Where do you believe the CEO ~~could improve~~ could demonstrate improvement:
