

CEO Management/Leadership Survey 2026

The CEO:

	Outstanding	Commendable	Satisfactory	Needs Improvement	Unable to Access
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.	()	()	()	()	()

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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.	()	()	()	()	()

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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.	()	()	()	()	()

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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:
