**Top Leader Annual Assessment**

**REMINDER TO READERS OF THIS BOOK**

This CEO Assessment template and the Board Self-Assessment template (Tool #5) are designed to be dropped into an online survey software[, such as *www.SurveyMonkey.com*.](http://www.SurveyMonkey.com/)

On the following pages is an example of how you might create and customize a “360” assessment for your CEO.

Thanks to Jeff Lilley, board coach, for allowing us to use an assessment survey example from his CEO years at Seattle’s Union Gospel Mission.

## Email Cover Memo (with survey link) and Introductory Page on the Survey

Attn: Seattle's Union Gospel Mission Board of Directors SURVEY DEADLINE: Feb. 22 – Tuesday 5 p.m.

Thank you for investing time, thought and prayer into this survey. Your insight and wisdom will help advance both the ministry of the Mission and the leadership of Jeff Lilley. Individual responses to this survey will remain ANONYMOUS and the combined results, along with all of the individual responses to the essay questions, will be shared with the Executive Committee and with Jeff at the next Executive Committee meeting. (John Pearson will be facilitating this process on that Friday.)

When you’re connected to the Internet, please click on this link:

[INSERT SURVEY LINK HERE]

This is one of three online surveys. Jeff's direct reports (6 people) will also be completing a second survey and Jeff will complete a third survey: his self-assessment.

This survey was created by John and used in recent years with our previous CEO. It includes updated edits from Jeff, John, and myself.

Note: The survey must be completed in one sitting. You may now pray and then begin! THANKS!

[Name]

Chair, Board of Directors

# **SECTION A:**

**Introduction to the Annual CEO Assessment Survey – Board Members**

(Drop into a survey template at *www.SurveyMonkey.com*)

➤**1.** How many years have you served on the board?

* Less than 1 year
* 1 – 3 years
* 4 – 6 years
* 7 – 9 years
* 10 – 12 years
* 13 – 15 years
* 16 or more years

➤ **2. THE BOARD’S KEY ROLE.** Effective nonprofit boards know they must encourage and inspire the organization's CEO. The board must also affirm corporate goals and then CEO goals (Standards of Performance) that are aligned with the corporate goals. Then, the board must monitor CEO performance and reward achievement. If the annual goals are clear, then performance evaluation is thoughtful and objective. If the goals are fuzzy, then the CEO performance process can become rather subjective.

## So . . . check ALL that apply below:

* Seattle's UGM has clear annual corporate goals.
* The President (Jeff Lilley) has specific annual goals.
* The board has effectively monitored Jeff's performance against the approved annual goals.
* We've been in transition for a while, so I'm OK with a lack of clear annual goals, but the board needs to address this in the next 30 to 90 days.
* I'm not a big fan of annual performance reviews.
* An annual performance review of the President is an imperative!
* Other (please specify):

# **SECTION B**:

**Cause, Community, Corporation**

The leadership and management functions can be described with three hats the CEO wears: The Cause, The Community, and The Corporation. Please evaluate Jeff's effectiveness in these three areas. Your evaluation should reflect his overall effectiveness for all programs and functions. You can note specific affirmations and areas needing improvement in the essay questions near the end.

➤ **3. THE CAUSE.** Please check how effective you believe Jeff has been in each of these key leadership and management areas, during the last 12 months. (Check "N/A" if you have no first-hand knowledge of his effectiveness.)

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **The Community:** ☑ | **1****Very Ineffective** | **2****Ineffective** | **3****Neither Ineffective nor Effective** | **4****Effective** | **5****Very Effective** | **N/A** |
| RESULTS-ORIENTED (Part 1).Identifies desired outcomes and results. |  |  |  |  |  |  |
| RESULTS-ORIENTED (Part 2).Accomplishes desired outcomes and results. |  |  |  |  |  |  |
| CUSTOMER-FOCUSED.Facilitates board/staff agreement on who are our primary and supporting customers (recipients, donors, volunteers, etc.). |  |  |  |  |  |  |
| STRATEGY-DRIVEN.Creates and executes strategies to achieve results. |  |  |  |  |  |  |
| PROGRAM-COMPETENT.Able to roll out sustainable programs that achieve agreed-upon results, that are under budget, that are within our value system, and demonstrate high quality. |  |  |  |  |  |  |

➤ **4. THE COMMUNITY.** Please check how effective you believe Jeff has been in each of these key leadership and management areas, during the last 12 months. (Check "N/A" if you have no first-hand knowledge of his effectiveness.)

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **The Community:** ☑ | **1****Very Ineffective** | **2****Ineffective** | **3****Neither Ineffective nor Effective** | **4****Effective** | **5****Very Effective** | **N/A** |
| LEADER-LEARNER.Models life-long learning as a leader. |  |  |  |  |  |  |
| LEADER-MENTOR.Coaches and mentors his key people. |  |  |  |  |  |  |
| SERVANT-LEADER.Demonstrates God-honoring servant leadership. |  |  |  |  |  |  |
| PEOPLE-STUDENT (Part 1).Continually improves his own people skills; effectively applies such skills to all his people interactions. |  |  |  |  |  |  |
| PEOPLE-STUDENT (Part 2).Understands people styles, strengths and giftedness. |  |  |  |  |  |  |
| ACHIEVEMENT-CELEBRATOR.Has a system in place to celebrate individual and team performance so staff and volunteers are rewarded, affirmed and celebrated. |  |  |  |  |  |  |
| CULTURE-INTERPRETER.Understands the organization's culture and ethos and communicates it to the various constituencies (recipients, board, donors, staff, volunteers, etc.). |  |  |  |  |  |  |
| TEAM-BUILDER.Creates winning teams and builds a climate for others to do the same. |  |  |  |  |  |  |
| FUN-INTENTIONAL.Leads the team in enjoying work and life, having fun, creating memories and demonstrating balanced lives. |  |  |  |  |  |  |
| DONOR-SMART.Creates a sustainable fundraising and development strategy. |  |  |  |  |  |  |
| VOLUNTEER-PURPOSED.Builds a volunteer movement that serves both the mission of the organization and the volunteers. |  |  |  |  |  |  |
| CRISIS-READY.Has crisis plans in place and the board's confidence that we're ready for most crises, if they were to hit. |  |  |  |  |  |  |

➤ **5. THE CORPORATION.** Please check how effective you believe Jeff has been in each of these key leadership and management areas, during the last 12 months. (Check "N/A" if you have no first-hand knowledge of his effectiveness.)

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **The Community:** ☑ | **1****Very Ineffective** | **2****Ineffective** | **3****Neither Ineffective nor Effective** | **4****Effective** | **5****Very Effective** | **N/A** |
| BOARD-DEVELOPER.Helps facilitate a plan for the board's role and influence and works with officers and committees to serve and inspire them. |  |  |  |  |  |  |
| BUDGET-PRUDENT.Creates a sustainable budget and financial plan and forecasts, achieves and reports financial info at agreed-upon dates. |  |  |  |  |  |  |
| DELEGATION-SKILLED.Delegates as much as possible and focuses on what only the CEO can and should be doing. |  |  |  |  |  |  |
| OPERATIONS-SYSTEMIZED.Creates operational policies and procedures and systems that serve, not hamper, progress and results. |  |  |  |  |  |  |
| COMMUNICATION-ORIENTED.Understands the importance of targeted PR, marketing, branding and messaging; creates systems for evaluation and improvement. |  |  |  |  |  |  |
| MEETINGS-ENHANCER.Facilitates formal and informal gatherings of UGM people (recipients, board, staff, volunteers, donors, etc.) and adds value and energy to what could be routine or mundane meetings. |  |  |  |  |  |  |

# **SECTION C:**

**President’s Position Description**

Position descriptions provide general guidelines of responsibilities(but not specific annual goals with metrics). However, it is helpful to review the position description each yearand assess alignment.

➤ **6. PRESIDENT'S POSITION DESCRIPTION.** Based on the key responsibilities outlined in the President's Position Description, please check how effective Jeff has been in these areas in the last 12 months. (Check N/A if you have no first-hand knowledge of his effectiveness.)

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **President’s Position Description:** ☑ | **1****Very Ineffective** | **2****Ineffective** | **3****Neither Ineffective nor Effective** | **4****Effective** | **5****Very Effective** | **N/A** |
| Leadership |  |  |  |  |  |  |
| Strategic planning |  |  |  |  |  |  |
| Fundraising |  |  |  |  |  |  |
| Board of Directors relations |  |  |  |  |  |  |
| Public relations |  |  |  |  |  |  |
| Maintain Customer Service standards (CARE)[[1]](#footnote-1) |  |  |  |  |  |  |

➤ **7. PRESIDENT'S PERSONAL LEADERSHIP.** Based on these "softer" personal leadership elements outlined in the President's Position Description, please check how effective Jeff has been in these areas in the last 12 months. (Check "N/A" if you have no first-hand knowledge of his effectiveness.)

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **President’s Personal Leadership:** ☑ | **1****Very Ineffective** | **2****Ineffective** | **3****Neither Ineffective nor Effective** | **4****Effective** | **5****Very Effective** | **N/A** |
| Maintains a vision for the Mission. |  |  |  |  |  |  |
| Maintains a public and private life that is consistent with 1 Timothy 1-6, with an indisputable reputation within the community. |  |  |  |  |  |  |
| Maintains a servant's heart for both people and ministries. |  |  |  |  |  |  |

# **SECTION D:**

**Leveraging Strengths**

➤ **8. JEFF’S GREATEST STRENGTHS.** Any list is incomplete because every person (every CEO) is uniquely gifted by God. No one CEO has all the gifts! But, please list here the greatest strengths, in your opinion, that Jeff demonstrates in his leadership of Seattle's Union Gospel Mission:

➤ **9. JEFF’S TOP-5 STRENGTHS.** According to the CliftonStrengths® assessment for Jeff, his Top-5 Strengths are:[[2]](#footnote-2)

1. **“STRATEGIC®** – People especially talented in the Strategic theme create alternative ways to proceed. Faced with any given scenario, they can quickly spot the relevant patterns and issues.”
2. **“INPUT®** – People especially talented in the Input theme have a craving to know more. Often they like to collect and archive all kinds of information.”
3. **“LEARNER®** – People especially talented in the Learner theme have a great desire to learn and want to continuously improve. The process of learning, rather than the outcome, excites them.”
4. **“INTELLECTION®** – People especially talented in the Intellection theme are characterized by their intellectual activity. They are introspective and appreciate intellectual discussions.”
5. **“BELIEF®** – People especially talented in the Belief theme have certain core values that are unchanging. Out of these values emerges a defined purpose for their lives.”

## In your opinion, do people around Jeff help him maximize these Top-5 strengths?

* + Yes
	+ No
	+ Other (please specify):

# **SECTION E:**

**Your Open-Ended Assessment Thoughts**

Here's your chance to communicate your specific thoughts regarding Jeff's performance evaluation. (Reminder: while this is anonymous, 100 percent of your comments below WILL be included in the confidential report given to Jeff and the Executive Committee.)

➤ **10. GROWTH OPPORTUNITIES.** As you reflect on [this past year] and Jeff's [first] year of leadership at Seattle's Union Gospel Mission, identify the areas where Jeff now needs to grow in order to be a more effective leader.

➤ **11. MAGIC WAND #1.** If you could "wave a magic wand" and encourage Jeff to START doing something new or different, in his leadership role in the next 12 months, what would it be?

➤ **12. MAGIC WAND #2.** What should Jeff STOP doing in his leadership role (or style) in order to become a more effective leader for the organization?

➤ **13. THE BOARD'S ROLE.** In your opinion, what should the board do differently (if anything) to serve Jeff more effectively?

➤ **14. MEMO TO JEFF.** (Please be brief!) Here's your chance to share a thought or two with Jeff— on any concern, idea, affirmation, or even something that maybe bugs you. (Note: Everyone will read these comments also. Be discerning here. Perhaps what you need to share should be done in a one-on-one setting first with Jeff.)

➤ **15. OPTIONAL:** LAST CHANCE. Any other comments for the Executive Committee or Jeff?
Thank you for investing time in this survey.

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1. Seattle’s Union Gospel Mission defines customer service standards with CARE (Committed, Attentive, Responsive, Excellent). [↑](#footnote-ref-1)
2. CliftonStrengths® and each of the 34 theme names are trademarks of Gallup, Inc. To discover your top five CliftonStrengths®, please visit the Gallup Strengths Center at [*https://www.gallupstrengthscenter.com*/](https://www.gallupstrengthscenter.com/). [↑](#footnote-ref-2)