

BOARDROOM METRICS CEO EVALUATION TEMPLATE

This survey can be input to Survey Monkey or other on-line survey tool. Data can be collected and analysed confidentially. The survey can also be administered using a fillable or non-fillable PDF and distributed by email.

Survey Questions

1. My role in the organization is:

- CEO
- Board member
- Leadership Team
- Partner
- Other

2. The CEO has effectively lead the development, communication and implementation of the strategic plan for the organization.

- Strongly Disagree
- Disagree
- Neutral/Neither agree nor disagree
- Agree
- Strongly Agree

Comment if applicable:

3. Financial results meet or exceed financial goals set by the Board.

- Strongly Disagree
- Disagree
- Neutral/Neither agree nor disagree
- Agree
- Strongly Agree

Comment if applicable:

4. The CEO leads a productive, respectful relationship with the Board that drives trust and collaboration.

- Strongly Disagree
- Disagree
- Neutral/Neither agree nor disagree
- Agree
- Strongly Agree

Comment if applicable:

5. The CEO sets an organizational tone that attracts, motivates, retains and develops a caring, talented workforce.

- Strongly Disagree
- Disagree
- Neutral/Neither agree nor disagree
- Agree
- Strongly Agree

Comment if applicable:

6. The CEO develops and maintains effective relationships with the external stakeholders of the organization.

- Strongly Disagree
- Disagree
- Neutral/Neither agree nor disagree
- Agree
- Strongly Agree

Comment if applicable:

7. The CEO consistently reflects, represents and promotes the interests and values of the organization internally and externally.

- Strongly Disagree
- Disagree
- Neutral/Neither agree nor disagree
- Agree
- Strongly Agree

Comment if applicable:

8. From my perspective, the CEO is making an effort to address any concerns I had in the last assessment.

- Strongly Disagree
- Disagree
- Neutral/Neither agree nor disagree
- Agree
- Strongly Agree

Comment if applicable:

9. From my perspective, the CEO approach to leadership is very strong.

- Strongly Disagree
- Disagree
- Neutral/Neither agree nor disagree
- Agree
- Strongly Agree

Comment if applicable:

10. Do you have any recommendations to give the CEO on their approach to leading the organization?

11. Please provide any additional comments or insight you would like to share.

Interview Questions

1. Please describe the CEO's strengths.
2. What impact do you think the CEO has had on the organization?
3. If you were the CEO's coach, what strengths or weaknesses would you suggest they focus on to have even greater impact?
4. Thinking ahead to the challenges the organization is facing, what advice would you give the Board on the CEO?
5. Other thoughts?

Notes on conducting an effective CEO evaluation

1. Include the CEO in the evaluation process.
2. Confidentiality is vital. Without it, assessors will not provide accurate feedback.
3. Go outside the Board for perspective. Often, what the Board sees is not what others see.
4. Too many questions and too many rating choices dilute results.
5. Conduct interviews as well as gathering survey results. Interviews provide an extra layer of understanding not possible through surveys alone.
6. Follow up the evaluation with a Board-approved set of next steps, including objectives and plans for improving performance.