

## The President/COO Self-Assessment Questionnaire\*

(Place an "x" mark in your response)

Evaluation Questions	UNACCEPTABLE	REQUIRES IMPROVEMENT	SATISFACTORY	GOOD	EXCELLENT
<b>Leadership: The President/COO...</b>					
1. Has clearly defined the basic purpose or mission of the organization.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Has clearly defined a vision for the organization in the future.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Has attracted a high-performing senior Management Team with the knowledge, skills, energy and passion to make the mission and vision a reality.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Leads a planning process that establishes annual goals, strategies and action plans that are consistent with the vision and mission.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Leads a performance management process that ensures accountability at all levels of the organization and makes mid-course corrections in goals and strategies as necessary.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Consistently makes decisions that enable the organization to achieve its goals better.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Regularly demonstrates creativity in identifying new opportunities and solving issues that the organization is facing.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Communicates effectively with internal and external stakeholders to build support for the mission, vision, goals and direction of the organization.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Management: The President/COO...</b>					
9. Has established an effective organization structure, ensuring that there is management focus on key functions necessary for the organization to deliver on its mission.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Delegates effectively to members of the senior management team and other staff.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Clearly anticipates priorities and ensures management focus and accountability around addressing priorities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Solicits feedback from the organization's stakeholders including employees at all levels as input to the direction and operation of the organization.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Regularly delivers a consistent message to all stakeholders regarding the vision, mission and priorities of the organization.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Ensures the work of the organization is supported by effective processes for planning, communicating, measuring, governing, delivering quality, and providing for a safe work environment.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. Ensures there are clear policies established for how the organization and employees will operate.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

\*Data Source: The Institute of Corporate Directors

<b>Evaluation Questions</b>	UNACCEPTABLE	REQUIRES IMPROVEMENT	SATISFACTORY	GOOD	EXCELLENT
<b>Working with the Board: The President/COO...</b>					
16. Understands the organization's requirement for governance practices and supports the Board in its governance duties by providing necessary information and access to people.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17. Has a strong working relationship with the Chairman of the Board.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. Has a strong working relationship with the Members of the Board of Directors.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19. Updates the Board regularly on plans, performance, issues and opportunities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20. Ensures the Board receives information destined for outside stakeholders before it is publicly disclosed.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21. Helps educate the Board on the organization.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22. Executes direction that is provided by the Board of Directors.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23. Helps the Board of Directors identify the Organization's assets and to ensure that these assets are protected legally and physically from outside threats.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Financial Management: The President/COO...</b>					
24. Has a solid, up-to-date understanding of the organization's income statement, balance sheet, cash flow, and other financial measures relevant to its business and financial situation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25. Is supported by a qualified and competent CFO or other finance officer and who has day-to-day accountability for managing and monitoring the organization's finances.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
26. Understands the concept of value creation and makes decisions on where to allocate resources based on maximizing value to the organization.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
27. Ensures that the organization's financial records are accurate and up-to-date.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**ACCOMPLISHMENTS**

List the President/COO's major accomplishments over the past year, then identify the traits/skills the President/COO exhibited in making them happen.

<b>Accomplishments</b>	<b>Traits / Skills</b>
1. _____ _____	_____ _____
2. _____ _____	_____ _____
3. _____ _____	_____ _____
4. _____ _____	_____ _____

*Note: Use additional sheets, if necessary*

**GOALS**

List the President/COO's key goals for the past year and the status of achievement of each.

<b>Goals</b>	<b>Status</b>
1. _____ _____	_____ _____
2. _____ _____	_____ _____
3. _____ _____	_____ _____
4. _____ _____	_____ _____

*Note: Use additional sheets, if necessary*

**OPPORTUNITIES TO INCREASE PERFORMANCE**

List the areas where the President/COO could improve personal performance and how those areas could be developed.

<b>Development Opportunities</b>	<b>Resources / Plan</b>
1. _____ _____	_____ _____
2. _____ _____	_____ _____
3. _____ _____	_____ _____
4. _____ _____	_____ _____

*Note: Use additional sheets, if necessary*

**PERFORMANCE GOALS - UPCOMING YEAR**

List the President/COO's key goals for the organization in the upcoming year and an outline of how each goal will be accomplished.

<b>Key Goals</b>	<b>Traits / Skills</b>
1. _____ _____	_____ _____
2. _____ _____	_____ _____
3. _____ _____	_____ _____
4. _____ _____	_____ _____

*Note: Use additional sheets, if necessary*

**Prepared By:**

\_\_\_\_\_  
**Printed Name & Signature**