



Copy of Seattle's UGM Annual CEO Assessment 2011 - Board

Introduction to the Annual CEO Assessment Survey

Attn: Seattle's Union Gospel Mission Board of Trustees
SURVEY DEADLINE: Feb. 22, 2011 - 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 February 25, 2011 Executive Committee meeting. (John Pearson will be facilitating this process on that Friday.)

This is one of three online surveys. Jeff's direct reports (7 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 previously with Herb Pfiffner. It includes 2011 edits from Jeff, John and myself. Note: The survey must be completed in one sitting. You may now pray and then begin!
THANKS!

Andy Toles
Chair, Board of Trustees

P.S. When the survey uses the word "CEO," we are referring, of course, to Jeff Lilley as President.

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)



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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 open-ended 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.)

	Very Ineffective	Ineffective	Neither Ineffective nor Effective	Effective	Very Effective	N/A
RESULTS-ORIENTED (Part 1). Identifies desired outcomes and results.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
RESULTS-ORIENTED (Part 2). Accomplishes desired outcomes and results.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
CUSTOMER-FOCUSED. Facilitates board/staff agreement on who are our primary and supporting customers (recipients, donors, volunteers, etc.).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
STRATEGY-DRIVEN. Creates and executes strategies to achieve results.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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.)

	Very Ineffective	Ineffective	Neither Ineffective nor Effective	Effective	Very Effective	N/A
LEADER-LEARNER. Models life-long learning as a leader.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	Very Ineffective	Ineffective	Neither Ineffective nor Effective	Effective	Very Effective	N/A
LEADER-MENTOR. Coaches and mentors his key people.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SERVANT-LEADER. Demonstrates God-honoring servant leadership.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
PEOPLE-STUDENT (Part 1). Continually improves his own people skills; effectively applies such skills to all his people interactions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
PEOPLE-STUDENT (Part 2). Understands people styles, strengths and giftedness.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ACHIEVEMENT-CELEBRATOR. Has a system in place to celebrate individual and team performance so staff and volunteers are rewarded, affirmed and celebrated.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
CULTURE-INTERPRETER. Understands the organization's culture and ethos and communicates it to the various constituencies (recipients, board, donors, staff, volunteers, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
TEAM-BUILDER. Creates winning teams and builds a climate for others to do the same.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Neither
Ineffective nor
Effective

Very Ineffective Ineffective Effective Effective Very Effective N/A

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.)

Neither
Ineffective nor
Effective

Very Ineffective Ineffective Effective Effective 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.

	Very Ineffective	Ineffective	Neither Ineffective nor Effective	Effective	Very Effective	N/A
<p>BUDGET-PRUDENT. Creates a sustainable budget and financial plan and forecasts, achieves and reports financial info at agreed-upon dates.</p>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<p>DELEGATION-SKILLED. Delegates as much as possible and focuses on what only the CEO can and should be doing.</p>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<p>OPERATIONS-SYSTEMIZED. Creates operational policies and procedures and systems that serve, not hamper, progress and results.</p>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<p>COMMUNICATION-ORIENTED. Understands the importance of targeted PR, marketing, branding and messaging; creates systems for evaluation and improvement.</p>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<p>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.</p>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



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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 year and 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.)

	Very Ineffective	Ineffective	Neither Ineffective nor Effective	Effective	Very Effective	N/A
Leadership	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Strategic planning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fundraising	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board of Trustees relations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Public relations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Maintain Customer Service Standards: CARE (Committed, Attentive, Responsive, Excellent)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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.)

	Very Ineffective	Ineffective	Neither Ineffective nor Effective	Effective	Very Effective	N/A
Maintains a vision for the Mission.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Maintains a public and private life that is consistent with 1 Timothy 1-6, with an indisputable reputation within the community.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Maintains a servant's heart for both people and ministries.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



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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 Jeff's StrengthsFinders assessment, his Top-5 Strengths are:

1) STRATEGIC - People strong 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 strong in the Input theme have a craving to know more. Often they like to collect and archive all kinds of information.

3) LEARNER - People strong in the Learner theme have a great desire to learn and want to continuously improve. In particular, the process of learning, rather than the outcome, excites them.

4) INTELLECTION - People strong in the Intellection theme are characterized by their intellectual activity. They are introspective and appreciate intellectual discussions.

5) BELIEF - People strong in the Belief theme have certain core values that are unchanging. Out of these values emerges a defined purpose for their life.

In your opinion, do people around Jeff help him maximize these Top-5 Strengths? (For more on strengths, go to www.StrengthsTest.com)

Yes

No

Other (please specify)



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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 2010 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 2011, 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 Mission?

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.

16. YOUR NAME. Your name will NOT be listed in the comments provided to the Executive Committee or Jeff. However, by inserting your name below, you will enable John Pearson to verify that all Board of Trustee members have completed the survey. Thanks!