

## ABC Retirement Community President/Chief Executive Performance Evaluation

### PERSONAL PERFORMANCE FACTORS:

	UNA	ACC	EXC	OUT	N/A
ANALYSIS – Critical problem examination, leading to identification of components and their relationships; developing solutions for critical issues. Examples: Issues relating to financial status, resident needs, employee needs					
COOPERATION – Working effectively with others to achieve common goals – board of directors, volunteers, staff, other organizations and the community. Examples: Board Exec cooperation, staff to staff cooperation					
CREATIVITY – Improvement of the organization by exploring new ideas; seeks additional knowledge, skills and advancement opportunities. Examples: Seeking second bids from banks such as Wells Fargo					
COMMUNICATION - Oral and written presentation of ideas, both within and outside Palm Village; understands and follows established policy. Examples: Board communications, resident communications, and all councils.					
INITIATIVE - Self-confident, enthusiastic performance of responsibilities with a minimum of direction; tries new ideas, willing to experiment and take risks. Examples: Solicit greater number of ROP and RC classes.					
JUDGMENT - Formation of sound evaluations by careful study of available facts and options and minimizing personal bias in decision making. Examples: Relationships with attorney, State of California.					
RELIABILITY AND EFFECTIVENESS – Consistently delivers results, dependable; instills confidence in others.					
Comments:					

## PROFESSIONAL ATTRIBUTES

	UNA	ACC	EXC	OUT	N/A
ORGANIZATIONAL UNDERSTANDING – Breadth of knowledge of the Palm Village’s mission and objectives; understanding of the fundamentals required for organizational effectiveness.					
PLANNING – Balanced development of long-term strategic objectives, annual budgeting and forecasting and staying ahead of day-to-day activities.					
COMMUNITY IMAGE – Consistent positioning as a respected community leader; effective interface with business executive and other civic leaders and development of the Palm Village’s brand image.					
FINANCIAL MANAGEMENT – Thorough grounding in asset management and financial responsibility; prudent judgment on financial matters.					
COMMUNITY NEEDS ASSESMENT – Thoughtful analysis of community needs and sensitivity to community based programs.					
ASSET DEVELOPMENT – Knowledge of contemporary fund raising techniques; personal comfort and effectiveness in major gift request situations, attention to methodical longer-term development requirement.					
LEADERSHIP – Effectively motivates the action of others – staff, board, volunteers and others; focuses on the future of the Palm Village.					
Comments:					

## SUPERVISORY PERFORMANCE:

	UNA	ACC	EXC	OUT	N/A
ORGANIZATION – Establishes staff goals, assigns priorities, details actions, creates time schedules and follows through to successfully achieve goals and responsibilities for the work unit.					
LEADERSHIP – Leads by example.					
TRAINING – Assists subordinates in developing and utilizing knowledge and skills to complete assigned responsibilities.					
COACHING/COUNSELING – Explains or demonstrates work techniques to subordinates and provides feedback for their performance. Teaching with staff.					
EMPLOYEE DEVELOPMENT – Assesses the strengths and weaknesses of subordinates and works out a program of continuing developmental abilities so that the subordinate’s job knowledge, skills and results can be increased.					
ECONOMY – Effectively controls costs and manages resources to bring about effective utilization of money, technology, human resources and time.					
FOCUS ON DIVERSITY – Implements positive actions are to assure compliance with policies and practices relative to employee diversity issues. Working with other faith communities and yet maintaining our own values.					
Comments:					

**OVERALL EVALUATION**

**Significant Accomplishments**

Identify significant accomplishments during this most recent performance period:

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**Areas of Consistent High Performance**

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**Developmental Needs**

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This evaluation has been reviewed and discussed:

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Chairman of the Board

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Date

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President/CEO

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Date

11/09/07