



CEO Annual Performance Feedback Form

Name:

Title: President & CEO

Appraisal period: FY 2021

Note: We wish for your comments and perceptions to be honest and focused for each question. The CEO will not see your name associated with your comments. All comments will be accumulated and provided to her, and, if we believe a response may be identifiable to you, we will mask that response. The goal is professional growth for the CEO and an honest review of her year will help her personally achieve that goal.

Reviewer's name:

Part 1: Overall progress of the Virginia Society of CPAs

Has the VSCPA made progress overall compared to the prior year in the key strategy areas?

Did the CEO move the Society forward in terms of our mission, our resources, public perception and engagement with outside stakeholders, and other identified objectives?

Part 2: Review of Annual Strategic Goals

Thoughtfully evaluate the VSCPA's achievement of the 2020-2021 strategic goals:

- Add specific goals here

High achievement goals:

Low achievement goals:

Comments:

Part 3: Review of Core Job Functions

Review the CEO's performance in the following core areas of her job functions:

- Engage with members to gain and maintain their support and seek to understand their needs
- Evaluate the changing landscape to find new opportunities for member value and organizational stability
- Engage with Virginia legislators, regulators and decision-makers to ensure CPAs' interests are known and understood
- Engage with national and external organizations to maintain strong relationships and influence
- Lead strong staff who manage program and service implementation effectively
- Connect with current and past leaders to ensure continuity and engagement

Comments on high performance:

Comments on improvement areas:

Part 4: Review of Leadership Competencies

Do you think the CEO has consistent performance in the following leadership competencies?

- Effective decision making and judgment
- Strategic thinking and vision
- Fosters innovation
- Represents the Society effectively
- Committed to the Society's mission and values
- Exceptional personal relationship skills
- Fosters collaboration
- Efficient use of her time
- Delegates well as needed
- Offers professional growth opportunities to you

Comments on high performance:

Comments on improvement areas:

Part 5: Reflect on the CEO's year and offer any thoughts or comments:

Choose the best option to describe the CEO's overall performance:

- Outstanding** – Exceptional, exemplary performer. The CEO achieves far above other individuals in a similar position.
- Commendable** – Strong, highly motivated performer; consistently performs above job requirements.
- Competent** – Consistently solid, capable performer; clearly meets job requirements.
- Marginal** – Needs improvement or displays inconsistent performance; below most others in performance or not meeting job requirements.
- Unacceptable** – Unsatisfactory performer: does not meet minimum job requirements, even after being counseled.

Additional thoughts or comments:

Part 6: Focus on the Future

What are the five most important priorities for the CEO during the upcoming year? Please explain your answers with thoughtful ideas to give her:

- 1.
- 2.
- 3.
- 4.
- 5.

