
20/20 Insight Special Report



University Federal Credit Union CEO Performance Evaluation

March 2015

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Section A. Job Responsibility Performance

1. Partners with the Board Chair and Board of Directors:

- On issues of vision, strategy, and leadership; nurtures transparent, trustworthy, and professionally-effective relationships.
- To ensure the Board Chairman and volunteer committee Chairs are supported in efforts to execute their respective charges.
- To develop and execute on a robust, ongoing strategic planning framework.
- To establish and maintain a rigorous volunteer recruiting and development process.

Individual Board of Director Comments for Item #1

2. Serves as an externally-focused, strategically-minded executive who:

- Positions the organization as a corporate role model within its marketplace.
- Envisions, defines, and communicates the organization’s market position and competitive advantage within its preferred strategic and tactical framework.
- Builds and nurtures strong individual relationships with members.
- Positions the organization as an “employer of choice.”

Individual Board of Director Comments for Item #2

3. Responsible for overall financial performance and viability of the organization and for the financial and physical security of assets, members, and staff members.

Individual Board of Director Comments for Item #3

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4. Position the organization to excel in electronic commerce through development and implementation of aggressive e-commerce strategies.

Individual Board of Director Comments for Item #4

SAMPLE

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Section B. Leadership, Cultural, and Behavioral Standards

Displays executive presence, emotional intelligence, and healthy self-confidence while remaining transparent, open to redirection, and grounded in UFCU’s relational culture and core values.

Individual Board of Director Comments for Section B

SAMPLE

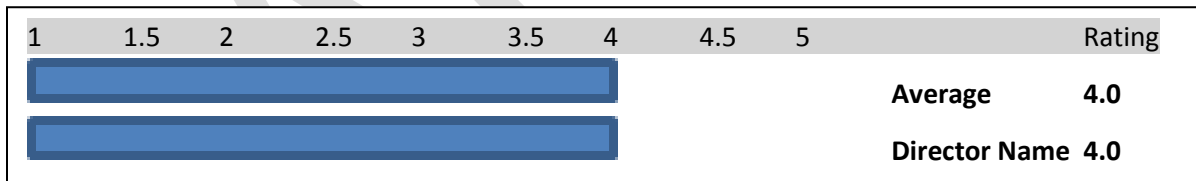
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Section C. Performance Evaluation Rating

Performance Rating Scale:

- 5 = Significantly Exceeds/Exceptional
- 4.5
- 4 = Exceeds Expectations
- 3.5
- 3 = Meets Expectations
- 2.5
- 2 = Needs Improvement
- 1.5
- 1 = Unsatisfactory

Based on your evaluation, please indicate your suggested performance evaluation score. Your score will be considered by the Board of Directors when discussing their collective evaluation of the CEO’s performance for the calendar year.



Overall Comments (Optional)

Individual Board of Director Comments
