

SAMPLE Credit Union CEO Qualitative Appraisal

President/CEO Evaluation

Rate the President/CEO by placing a number that best describes his/her performance on each factor during the review period using the following appraisal factor codes. List comments as desired.

5=**Superior**: Truly outstanding performance that is obvious to all.

4=**Excellent**: Performance is better than expected.

3=**Good**: Performance meets normal expectations.

2=**Fair**: Some deficiencies exist with performance.

1=**Marginal**: Performance is far below normal standard

Category 1: Organizational Leadership

a. The CEO works as an advocate for the credit union with members and with the public. He/she creates a positive image of the credit union by being active in community affairs and monitoring changing expectations. **Rating:**

b. The CEO understands the needs of the members and seeks to fill those needs with programs and services. He/she is current with financial trends and keeps the board informed of all developments. **Rating:**

Category 2: Business and Financial Management

a. The CEO ensures an organizational structure and the proper equipment that allows for maximum performance by all employees. **Rating:**

b. The CEO implements the credit union's financial goals. In concert with the CEO, the board will adopt yearly goals. These goals will be monitored by the CEO and presented to the board monthly. **Rating:**

c. The CEO makes strongly supported budgeting recommendations to the board. The board will adopt a yearly budget, and the CEO will brief the board monthly, informing us of compliance or if adjustments are required. **Rating:**

d. The CEO offers direction to the board on issues requiring board action and make appropriate recommendations on every action item. **Rating:**

Category 3: Personal characteristics that impact job performance

a. The CEO remains open to ideas and suggestions from the board, audit companies, internal reviews and compliance reports from overseeing authorities. He/she should be an innovator who accepts and promotes changes that will help our members and employees.

Rating: