

UNITED WAY WORLDWIDE

CEO PERFORMANCE MANAGEMENT

SEPTEMBER 2017



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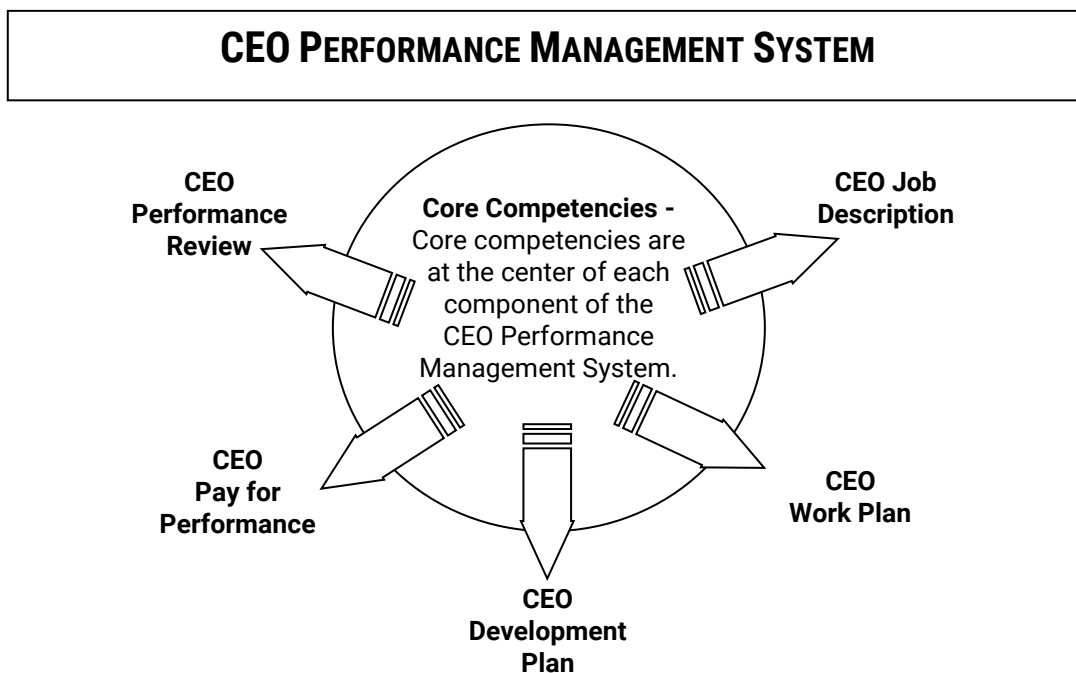
Section I. Overview: CEO Performance Management System

Obtaining the desired results from an organization doesn't just happen. It requires an ongoing conscious effort by all involved, and especially by the organization's leadership. The CEO Performance Management System is designed to help the Board and CEO develop, agree on, and evaluate goals and performance standards. While there are many ways to structure a performance management system, all must be effective at steps: communicating expectations, measuring progress, and providing feedback. The following system provides such a framework.

Inside this CEO Performance Management System are elements that can support your CEO in moving your organization forward by supporting his/her performance. The key elements of the CEO Performance Management System are:

- CEO Job Description
- CEO Work Plan & Process
- CEO Development Plan & Process
- CEO Pay for Performance
- CEO Performance Review
- CEO Core Competencies

What follows is a CEO Performance Management System with elements broken out for you to consider as you move forward with developing your performance system. All of the ideas, processes and forms are for you to reference and/or use in establishing a performance management system that meets the needs your United Way organization.



At the center of the CEO Performance Management System are CEO core competencies required for the position. These competencies are defined as behaviors and represent the essential skills and abilities

that a CEO must have for high-performance. You will select the critical competencies for your United Way based on the unique needs and challenges your United Way faces. (This document provides the list of competencies to select from and a suggested process for making your selection.)

Achieving desired results means identifying, developing, and leveraging the CEO's competencies. Each component of the system helps achieve this by creating a year-round performance management cycle.

The CEO Job description is the first component. It is written from a short list of core competencies and work processes. It is an essential element for defining and communicating performance expectations. It can be used as a tool in the hiring process to develop interview questions. It should also serve as one of the sources during the CEO Performance Review.

The CEO Job description sets broad expectations for the position. It is also critical that all parties agree on the specifics of performance for the year. The CEO Work Plan helps to clarify and agree on the key goals and results for the year. The CEO Work Plan acts as the action plan for how the CEO will support and reach the organizational objectives that the Board has agreed upon. This then becomes the basis from which CEO performance will be evaluated. The Work Plan in turn informs the discussion of development needs. The CEO Development Plan helps identify steps to develop and strengthen skills and competencies of the CEO that will lead to enhanced performance. The development plan represents the organization's investment in leadership capacity building for the future.

When all of these components are put together, they form the CEO Performance Management System. This system is designed to support the role of CEO and results in a well-conceived performance management plan that enhances and increases the performance of a United Way.

Section II: CEO Job Description

The job description is the connection between all of the other components of the management system. It defines what the CEO will do in the position they hold. A well conceived job description is driven by both core competencies and work processes. The core competencies are those skills and attributes that a person must have to perform well in this position. They are determined both by the position itself as well as where the organization is in its business cycle and growth.

Questions to Consider When Designing the Job Description:

- What are the key business goals and objectives for the next year? Two years?
- What is your competitive environment like and how will it impact the organization's ability to meet these goals and objectives?
- What are the key success factors for achieving the outcomes captured in the goals and objectives?
- What are the barriers to optimally performing the work activities?
- What are the most critical people/financial issues you currently face?
- What do you think the most critical people/financial issues will be in one or two years?
- Which capabilities are most critical to your business?

The job description can be used to develop questions during the CEO selection process as well as serve as guideposts for what an executive is held accountable for and connects with the performance review at the end of the year.

The content and format of the CEO Job Description presented in this document is meant to serve as a suggested guideline for customizing the CEO Job Description for your United Way. Also included is a list of ten competencies that were force-ranked by a select group of United Way CEOs and Chief Volunteer Officers during the validation work of the CEO Competency Model.

A sample CEO Job Description along with competencies can be found on pages 13 – 21 of the Appendix.

Section III. CEO Work Plan

A work plan should lay out the core areas of work for the coming year. It identifies critical organizational goals and the high-level actions to achieve those goals. A work plan is simply a tool for linking specific activities to the goals they serve—and the people who agree to take leadership responsibility for making something happen. Target dates and indicators of completion are core components of the work plan that ensure that goals will be met.

CEO Work Plan Design Elements:

In developing a work plan, the following elements should always be considered as core to the success of the process.

- Defined timeframes
- Defined action items with measurable time frames.
- Identified outcomes with timeframe completed
- Periodic Executive Review
- Clearly defined system for review
- Clearly defined schedule for review

A sample CEO Work Plan Form can be found on page 21 of the Appendix.

The CEO Work Plan is an essential tool that each CEO should utilize to plan their work in response to the organization's goals.

- A) The CEO Work Plan is a tool that acts as the CEO's response to the organization's strategic and tactical objectives for the year.
- B) The CEO should complete this work plan based on the organization's strategic plan and on the CEO Performance Review.

Section IV. CEO Development Plan and Process

If the CEO's capacity does not increase over time, neither will his/her performance. An investment in CEO capacity is directly linked to organizational results. The CEO Development Plan is used to guide the CEO and Board to invest time, effort, and resources in high leverage development opportunities, be they building on strengths or addressing weaknesses. Simply put, leadership development is an effort that enhances the learner's capacity to lead people. By making the CEO a more effective leader, the CEO will help make the organization a more effective organization.

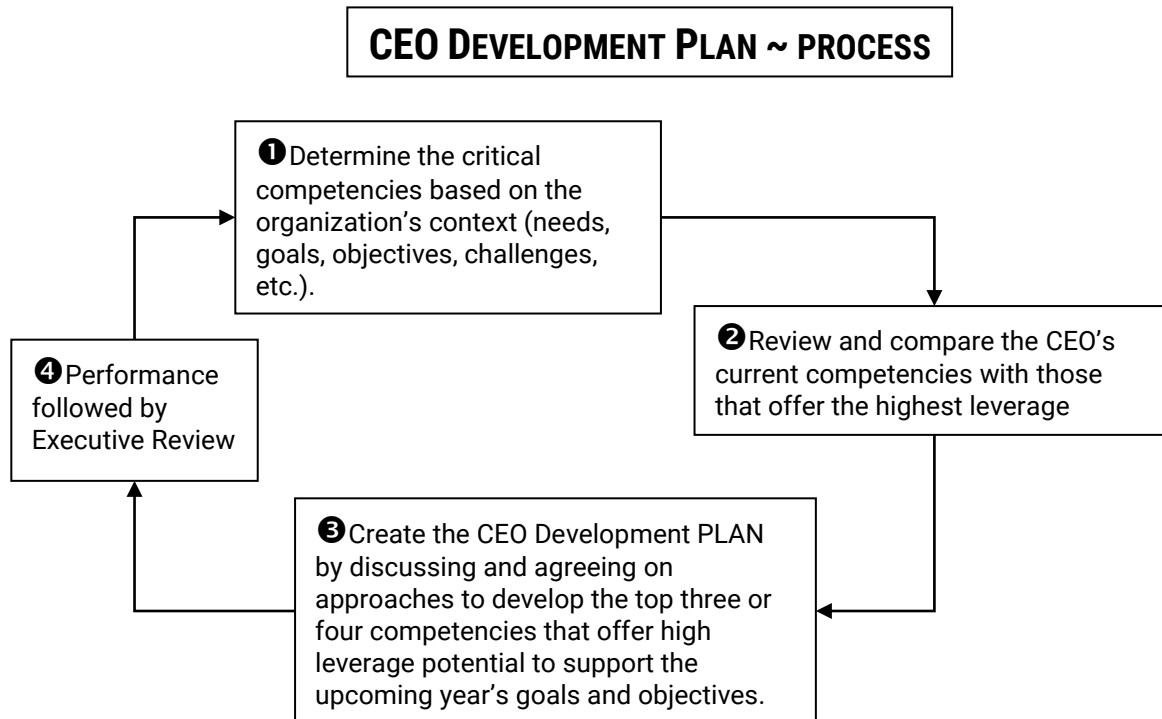
CEO Development Plan Design Elements:

In crafting a CEO development plan, the following elements should be considered as essential to the success of the process.

- Defined timeframe
- Defined competencies needing improvement
- Identified development options with timeframe completed
- Accountabilities and measurement of improvement
- Periodic executive review
- Clearly defined system for review
- Clearly defined schedule for review

The following are ideas about how to use the CEO Development Plan as well as how to focus on targeted areas for CEO improvement.

- A) The CEO Development Plan is an active tool that each CEO can use to plan their development in response to the organization's goals and the CEO's goals for learning in the upcoming year.
- B) The CEO Development Plan is a tool to help the CEO respond to ideas from the Executive Performance Review. The development plan spells out the actions that the CEO will take to develop, learn and improve to become even more effective.
- C) The CEO should complete this development plan based on the feedback and discussion received in the Executive Performance Review. This review should reveal opportunities for growth, either in terms of addressing a weakness or further building strengths.
 - Every CEO Development Plan should include the most critical (three or so) and/or high-leverage competencies.
 - HOW do you decide which competencies are most critical and/or high-leverage? Focus on context:
 - Consider the stage your United Way is in as far as growth, development, changes and needed improvements.
 - Again consider the answers to the following key questions:
 - What are the key business goals and objectives for the next year? Two years?
 - What is your competitive environment like and how will it impact the organization's ability to meet these goals and objectives?
 - What are the key success factors for achieving future outcomes?
 - What are the barriers to optimally performing the work activities?
 - What are the most critical people/financial issues you currently face?
 - What do you think the most critical people/financial issues will be in one or two years?
 - Which capabilities are most critical to your business?
 - List those CEO competencies required to make these things happen.
 - Using the CEO Performance Review as a guide, list the CEO competencies for which development will most likely enhance future results. (Again, these need not be weaknesses. Enhancing and leveraging an existing strength is often the best route to improving CEO and organizational performance.)
 - Similarly, review the CEO Work Plan and identify those competencies for which development will likely enhance future results.
 - REVIEW the list of core competencies and rank them. Select the top three or four competencies for which an improvement would translate into improved organizational results.



- D) The completed development plan should be presented to the Executive Committee of the Board of Directors for approval within thirty (30) days of the CEO receiving his/her Executive Review.
- E) The development plan components should be reviewed by the Executive Committee of the Board two times during the year:
- a. First, the CEO is responsible for placing a development plan update on the Board of Directors agenda at the mid-point between annual Executive Performance Reviews. At this update, the CEO should provide key learnings or actions that he/she has taken to support the development plan.
 - b. Second, the development plan should be reviewed again by the Executive Committee with the CEO at the annual Executive Performance Review.

A sample CEO Development Plan can be found on page 23-24 of the Appendix.

Section V. Pay-for-Performance Process & Options

Each United Way must determine if a Pay-for-Performance (P4P) system is right for them. It is not a required component of a CEO Performance Management System. In fact, most United Ways do not use a P4P. However, in the context of communicating expectations, providing feedback, and motivating performance, a P4P can be a very useful tool. This document provides a high-level look at the various methods of linking pay to a measure of individual, group or organizational performance.

Questions to Consider Before Implementing a Pay-for-Performance Plan:

- What are you trying to accomplish?
- How does pay-for-performance calculate into the CEO's Total Compensation?

- Would the plan be short-term or long-term? (Short-term being less than one year and long-term meaning lasting more than one year with no intention of discontinuing the P4P.)
- Is pay the primary motivator for the person in the position?

Pay-for-Performance should be considered as one component of the total compensation package for the CEO. Total compensation is the total amount you allocate in dollars and time to compensation, development, benefits and rewards to the CEO throughout the year.

Within the total compensation, you will want to know the market rates in your area in terms of total compensation for like positions. Market rates are those total compensation amounts in dollars that market surveys produced by local human resources consulting firms or accounting firms will create from like organizations. These numbers in dollars are also available on the web and can be researched regionally if you do not have this information locally.

Before you begin the process of a Pay-for-Performance system in your United Way, always have any pay system **reviewed by your legal counsel before implementing.**

As well, consider the pros and cons outlined below before implementing a plan and rolling it out.

Pros/Cons of Implementing a Pay-for-Performance Plan

Pros:

- A P4P program may attract and motivate people.
- Some research shows that financial rewards are among the most powerful tools for bringing about behavior change.
- It provides a direct incentive for employees to achieve defined work targets.
- Performance standards and gains may outweigh costs of running a P4P program.
- Establishing a means of rewarding high performance can assist in retaining the most industrious staff.

Cons:

- Most P4P programs are largely untested.
- Performance metrics can be harder to develop and measure for organizations with a public mission, as compared to companies focused simply on maximizing profits.
- Workers may be less motivated by cash rewards and more by the ability to make a difference, which can lessen the impact of monetary incentives.
- It can reduce pay equity and can make an authority liable to costly equal pay challenges if not operated fairly.
- There is a risk that participants expect a payout every year and in a low inflation climate the rewards may not be that great thus creating a performance demotivator.

Process

Assess the fit of a P4P system in your organization and your community. If it is determined that a P4P is appropriate, we provide the following as an approach to implementation.

Main Steps to creating a P4P Program

- Set clear specific measurable objectives and outcomes that the CEO must reach to obtain the reward.
- Appraise results so that you have a baseline measure of what is possible within a determined amount of time BEFORE implementing the P4P program.
- Link monetary and/or non-monetary incentives (listed below) to specific improvements that can be measured over a specific period of time
 - E.g. If you know that it is possible (by measuring before starting the program) to increase major donor giving by 5% each year, then you may create a stretch goal of 6% to earn the P4P reward OR you may tie the P4P reward to overall increased performance.
- Create an infrastructure to measure the program
 - This means that someone must monitor the outcomes, the link of the reward and when and how it is given out.
- Educate participant(s)
 - Share with the CEO exactly how the program works, when it begins and ends each cycle, when the reward will be given, and what will occur when a new cycle begins if performance goes down, stays the same or improves.
- Roll Out
 - Remember before the rollout, you need to measure what is possible so that the program is motivating to the participant.

Challenges

- Broad scale implementation and success of these programs must rest on the creation and deployment of an infrastructure that facilitates the collection, transmittal, and analyses of the performance data that will drive these programs.
- Successful P4P programs must be designed and implemented in a manner that engenders, maintains, and continually promotes trust among all of the participating parties.

Principles

- The goal of a P4P program should include a mix of monetary and non-monetary incentives that are designed to achieve clear and specific goals.
- When selecting an area of focus to incent, it is strongly encouraged to consider consistency with national and regional efforts in order to leverage change and reduce conflicting or competing measurement.
- The P4P program should be designed to ensure that metrics upon which incentive payments are based are credible, valid and reliable.
- The P4P program must be designed to acknowledge the united approach necessary to effect significant change.
- The measurement and reward framework should be strategically designed to permit and facilitate broad-scale change and achievement of performance goals within targeted time periods.

P4P Reward Options

- Monetary
- Performance Awards
- Rank Awards
- Retention Bonus
- Relocation Bonus

- Recruitment Bonus
- Additional Days Off
- Non-Monetary
- Recognition Awards
- Additional Days Off
- Long Term Disability Insurance (Post Employment)
- Deferred Compensation Plan

Pay-for-Performance and the CEO Work Plan

Consider linking the P4P option directly in the CEO Work Plan document. Questions are imbedded in the document that ask you to determine how you reward, when you reward, and to what outcome you will reward. See the sample form in the appendix for an idea on how to integrate the work plan and the pay-for-performance plan.

A sample CEO Work Plan linked to P4P process can be found on page 25 of the Appendix.

Section VI. CEO Performance Review Process

The performance review is divided into four main areas:

- CEO Work Plan from the previous year
- CEO Development Plan from the previous year
- CEO Competencies
- Summary and Overall Rating

CEO Work Plan

- At the beginning of the review period, individual goals with specific organizational success factors that link to the board-approved Strategic Plan should be developed.
- At the end of the review period, the success toward attainment of the organizational goals is recorded.

CEO Development Plan

- At the beginning of the review period, individual development goals with specific learning and development success factors should be created.
- At the end of the review period, the success toward attainment of the development goals is recorded.

CEO Competencies

- Each competency describes behaviors that are critical to executing performance goals and standards.
- Rate each competency. Provide comments on individual performance.
- Select a rating from the rating scale that is supported by the comments.

Summary and Overall Rating

- The reviewer(s) completes the summary section with an overview of the individual's strengths and areas for improvement.
- Select a rating from the Rating Scale that is supported by the individual ratings as well as the associated comments.

A sample CEO Performance Review Form can be found on page 26-31 of the Appendix.

Linking all the elements described in this brief explanation of a CEO Performance Management System is a starting step in building into the organization's culture a strong accountability process for achieving greater leadership impact and capacity building. To maximize effectiveness of such a system, it is necessary for the CEO and the Executive Committee to agree on each of the elements of this system, thus customizing it to the needs of your organization.

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CEO Job Description Sample and Core Competencies

Title: President and Chief Executive Officer

Developed in August 2012

Position Title: President & Chief Executive Officer

Reports to: Board of Directors

ORGANIZATION OVERVIEW

About *United Way of ANYTOWN*

{Insert brief overview of United Way of ANYTOWN}

OVERVIEW OF RESPONSIBILITIES

The President/CEO is the leader of the organization, establishing a vision for Community Impact that is achieved through the efforts of a diverse team of high-performing leaders, staff and volunteers alike. The President/CEO is the Chief Mobilizer; s/he leverages the power of relationships and networks, and works across private, public and corporate sectors to improve conditions in the community. The President/CEO possesses a high level of broad business and management skills and is effective at generating resources and financial support for the organization. The President/CEO is dedicated to shared and measurable goals for the common good – creating, resourcing, scaling and leveraging strategies for broad investment and impact. The President/CEO is the steward of brand and understands his/her role in growing and protecting the reputation of United Way. S/he is responsible for building trust in United Way and its relevance in the community. S/he values network and strives to leverage United Way's breadth of community presence, relationships, and strategy.

KEY RESPONSIBILITIES/ESSENTIAL FUNCTIONS

The major responsibilities of this position include, but are not limited to:

Community Impact

The President/CEO is responsible for the overall impact of *United Way of ANYTOWN* on the community, with particular emphasis on increasing its capacity to drive the impact agenda. The President works closely with the Board to craft and adapt the strategy to achieve this increased impact, including raising the funds to support it. S/he will establish and build relationships with top leaders in the community, including those representing the highest levels in business, government and non-profit sectors.

Resource Development

The President/CEO is charged to drive key results in fundraising; to identify, cultivate and solicit prospective donors and key leaders of prospective new corporate partners; to leverage personal and professional contacts and relationships into fundraising opportunities; and to promote a culture of fundraising in the organization, both at the staff and board level.

Strategic Management

The President/CEO serves as the principal resource to the Board of Directors and its key committees and gives strong direction in policy formulation and interpretation. S/he partners with the Board of Directors and the *United Way of ANYTOWN* Senior Leadership team to craft organizational goals and develops strategies to ensure that they are achieved. S/he ensures coordination and alignment of all United Way activities to strategic direction in the areas of community impact, resource development, and staff alignment.

Organization Management

The President/CEO is accountable for building and leading high-performing teams, ensuring all teams are aligned and collaborating to achieve organizational results. S/he maintains accountability for the operational and fiscal integrity of the organization within policies set by the Board of Directors. The President/CEO assesses organizational capacity to implement strategies and identify gaps in systems and staffing; directly supervises Senior Leadership positions and establishes individual goals; works with the Chief Financial Officer to manage organizational spending, monitor budget compliance, and mitigate financial risks; and ensures that *United Way of ANYTOWN* goals of inclusiveness and diversity among staff and volunteers are met.

EXPERIENCE/POSITION REQUIREMENTS

- Substantial experience working in the nonprofit sector (United Way experience is desirable), and interacting with volunteers and diverse boards. Alternatively, extensive experience in the leadership and management of organizations of comparable size and mission.
- Expertise on issues relevant to the organization.
- Ability to command the confidence and respect of stakeholders.
- A demonstrated track record of promoting diversity and an ability to build collaboration with the community at large.
- Experience in or across multiple sectors, including nonprofit, public and corporate environments.
- Experience in developing partnerships, building teams and conflict management.
- Experience in building revenue and increasing philanthropic support.
- Must demonstrate a high level of intelligence and intellectual curiosity and a desire to explore new ideas and innovative approaches to solving problems.

S/he has unquestioned integrity; a long term perspective; a strong sense of accountability; a practical ability to get things done; wisdom and good judgment; a fair and thoughtful approach to management, combined with the flexibility and courage to shift direction and experiment with new initiatives; excellent verbal and written communication skills; a high energy level and sense of humor.

Education Background

{Insert Education requirements of United Way of ANYTOWN}

Recommendation: Local United Ways can set their own education parameters as per the Community size and other preferences to best fit local conditions. Please, be careful to use the word “required” for only those items truly required, otherwise, we recommend that you state “preferred”.

WORK ENVIRONMENT

For use in the United States of America: Insert the requirements as prescribed by ADA Standards and any additional legal requirements as per your State’s s Employment Laws and Regulations.

For use internationally (outside of U.S.): Please follow your Country’s specific Employment Laws and Regulations.

CORE COMPETENCIES REQUIRED FOR THIS POSITION

CEO Specific

- **Visionary:** The CEO is the Chief Mission Officer, has a clear vision for the organization, confronts the complex realities of the environment and simultaneously maintains faith in a better future, providing purpose, direction, and motivation.
- **Organizational Leadership:** The CEO demonstrates strategic leadership balanced with authenticity, respect for others, and trust building within the organization, with the Board, and stakeholders. Proactively drives an organization to a higher level of performance, efficiency, and growth through inspiring action and commitment for best results.
- **Influence in the Marketplace:** The CEO has growth mindset, builds and cultivates network of relationships, is influential and leverages United Way's unique position to proactively increase visibility, reputation, and competitive advantage that generates interest, passion for investing in community. Successfully navigates the complex dynamics of local, regional, and national environment.
- **Grow Business and Revenue:** The CEO possesses a high-level of business acumen and broad management skillset, is effective at generating and growing financial support for the organization. Is able to raise funds by effectively engaging and linking a variety of donors (individuals, corporations, major giving, and other segments) and volunteers to inform and contribute to advancing the mission.
- **Partnership Mindset and Network-Oriented:** The CEO has a partnership mindset: s/he values and leverages the power of networks; Is leveraging the 1,800+ United Ways, its collective buying power, 11,000+ employees, 30,000+ board members, and United Way's breadth of community presence, relationships, and strategies. Provides leadership at the local, regional, national, and global level.

CORE for All Staff

- **Mission-Focused:** The United Way Pro's top priority is to create real social change that leads to better lives and healthier communities. This competency drives their performance and professional motivations.
- **Relationship-Oriented:** The United Way Pro understands that people come before process and is astute in cultivating and managing relationships toward a common goal.
- **Collaborator:** The United Way Pro understands the roles and contributions of all sectors of the community and can mobilize resources (financial and human) through meaningful engagement.
- **Results-Driven:** The United Way Pro is dedicated to shared and measurable goals for the common good; creating, resourcing, scaling, and leveraging strategies and innovations for broad investment and impact.
- **Brand Steward:** The United Way Pro is a steward of the brand and understands his/her role in growing and protecting the reputation and results of the greater network.

CEO Competency Model

The Chief Executive Officer competencies are critical to reinforcing United Way's position as a force that is bringing the community together to focus on complex problems for the greatest possible impact and results. Competencies inform the essential abilities (knowledge, skills, and behaviors) that United Way executives must have to perform their jobs successfully. United Way should use competency models to recruit, develop, assess performance and retain the highest quality talent.

The United Way Chief Executive Officer Competency Model has total of 10 competencies – 5 specific to a role of a Chief Executive Officer and 5 defined as “core” that are fundamental to our mission and a “must have” for all United Way professionals regardless of role and function. Each competency set provides a definition for the competency, and a set of attributes and behaviors that describe the specific qualities that are expected of an individual in the CEO role to perform at the highest level.

CEO Specific Competencies

VISIONARY	
Description	The CEO is the Chief Mission Officer, has a clear vision for the organization, confronts the complex realities of the environment and simultaneously maintains faith in a better future, providing purpose, direction, and motivation.
Attributes & Behaviors	<ul style="list-style-type: none"> - Is visionary thinker: Envisions, develops a clear vision for the future of the organization; Conveys a clear sense of the organization's purpose and mission that inspires, captures the passion and imagination of others. - Inspirational and persuasive communicator: Effectively communicates the purpose, direction and inspires motivation for United Way; Communicates effectively with all stakeholders in various settings, consistently displaying clarity, confidence and passion. - Displays courage, resilience and entrepreneurial spirit: Seeks, actively pursues and maximizes growth opportunities, and requires other staff to do so; Actively seeks new ideas and opportunities from untapped sources. - Initiates and leads change and transformation: Recognizes when it's time to shift strategic direction and anticipates and adapts to changes in order to sustain competitive advantage; Leads strategic change, both within and outside the organization, to meet organizational strategic goals effectively in a continuously changing environment. - Manages resistance to change: Understands and effectively addresses resistance to change by inviting and listening, encouraging people to express thoughts about the change, and bringing people together to deal with perceived problems. - Values continued learning and development of self and others: Is committed to learning and enhancing his/her leadership competence and capacity; Models the way, creates opportunities for staff, board and volunteers to generate and vet innovative ideas; Allocates resources toward strategic innovations.
ORGANIZATIONAL LEADERSHIP	
Description	The CEO demonstrates strategic leadership balanced with authenticity, respect for others, and trust building within the organization, with the Board, and stakeholders. Proactively drives an organization to a higher level of performance, efficiency, and growth through inspiring action and commitment for best results.
Attributes & Behaviors	<ul style="list-style-type: none"> - Puts people first: Understands that people are the engine that moves organization forward; Allocates time for developing, coaching and mentoring senior leaders and

	<p>employees in key roles, and top performing talent; Simplifies, inspires and motivates everyone to be focused on a shared organizational cultural values, goal and vision.</p> <ul style="list-style-type: none"> - Builds an effective and aligned team: Ensures that the right people are in the right roles at the right time; Fosters commitment, trust, and collaboration among staff, leaders and with stakeholders; Develops high-performance teams, removes obstacles to teamwork, by establishing a spirit of partnership, shared accountability and cohesion for achieving organizational goals and the mission. - Focuses staff on meeting the organization's vision, mission, and goals: Drives for shared accountability across organization, collaborative work to support the strategy and the customer; Fosters an inclusive workplace that supports and encourages the development of others; Supports constructive resolution of conflicts; Encourages collaboration with other United Ways. - Executive communication and presence: Expresses ideas clearly and uses language to build common understanding; Is visible and proactively creates trust and connection with others. - Committed to staff and volunteer talent development: Dedicates time to identifying and developing a diverse group of high-performing individuals (both volunteer and staff); Establishes clear expectations for subordinates' performance; Recognizes and rewards leaders and employees for achieving high quality, mission and growth focused efforts. - Values the diversity of people and ideas: Regularly considers diversity of individuals and ideas in team efforts; Leads and champions diversity and inclusion efforts within organization and community; Builds a diverse staff, board and volunteer leadership. - Builds solid partnership with the board: Cultivates and develops volunteer leadership needed to accomplish organizational goals; Proactively supports Board recruitment, onboarding, development and engagement; Engages board leadership on strategic issues 80% of the time.
INFLUENCE IN THE MARKETPLACE	
Description	<p>The CEO has growth mindset, builds and cultivates network of relationships, is influential and leverages United Way's unique position to proactively increase visibility, reputation, and competitive advantage that generates interest, passion for investing in community. Successfully navigates the complex dynamics of local, regional, and national environment.</p>
Attributes & Behaviors	<ul style="list-style-type: none"> - Leverages the unique advantage of United Way to shape competitive strategy: Develops distinctive strategies to achieve and sustain competitive advantage; Focuses organization on efforts that add significant value to the community and the donor, and enhances the reputation and impact of United Way. - Stays ahead of the curve: Is innovative, comes up with fresh perspectives, ideas that create value for the organization in the marketplace; Explores coming innovations, accompanying opportunities and challenges; Utilizes innovation mindsets and digital platforms to individually engage with donors. - Cultivates an active network of relationships: Convenes partners and forges collaborative initiatives and partnerships with organizations and individuals to drive impact and revenue for the advancement of the mission; Actively seeks and nurtures new relationships with diverse range of organizations and individuals to increase United Way's knowledge and influence of community condition. - Stewards reputation: Increases and protects the reputation and brand of United Way in the marketplace and community; Raises awareness of the mission and impact strategies to increase revenue; Responds to community conditions and donor expectations through two-way and external communication and with impact products. - Works across private, public, and corporate sectors to improve conditions in communities: Develops strategies and programs that align organizational priorities and actions with community aspirations; Ensures staff engages in discussion with external constituents to fully understand and respond to their needs, concerns and aspirations.

	<ul style="list-style-type: none"> - Values inclusion, different perspectives and cultures: Establishes goals and metrics that are monitored over time to authentically track community condition and the impact of initiatives. - Politically astute: Understands and operates effectively both within the political environment of the United Way network and the community; Uses political awareness to determine how best to get things done; Formulates, communicates, and advocates in an ethical and politically-sensitive manner.
GROWS BUSINESS AND REVENUE	
Description	The CEO possesses a high-level of business acumen and broad management skillset, is effective at generating and growing financial support for the organization. Is able to raise funds by effectively engaging and linking a variety of donors (individuals, corporations, major giving, other segments) and volunteers to inform and contribute to advancing the mission.
Attributes & Behaviors	<ul style="list-style-type: none"> - Drives for stakeholder success: Maximizes donor/customer satisfaction and loyalty by actively building relationship equity; Commits to listening, understanding, and analyzing market data, to create and deliver the best value for the donor/customer; Places organizational and team success above individual gain. - Fundraises effectively: Sets and pursues aggressive organizational revenue goals and drives for results; Continuously expands personal knowledge and skills of fundraising; Accepts accountability for personal achievements and failures in financial resource, revenue and business development; Leverages board and volunteer leaders to extend the reach – and fundraising efficacy – of the organization. - Employs an entrepreneurial and risk-taking mindset: Champions new ideas and initiatives; Identifies new business opportunities and make them a reality; Fosters innovation and appropriate risk taking; Identifies innovative strategies to address community concerns, creates products and captures appropriate resources and funding mechanisms. - Focuses on quality, innovation, and high-performance standards: Effectively manages human, financial, and information resources in an integrated and strategic framework. - Has financial acumen: Understands and uses financial analysis to create and evaluate strategic options and opportunities; Recognizes profitability and revenue potential in business opportunities; Sets clear and measurable goals for top executives and the organization as a whole; Consistently reviews progress towards those goals. - Is an effective, skilled negotiator: Possesses skill to co-create and co-manage with diverse partners for improved outcomes.
PARTNERSHIP MINDSET & NETWORK-ORIENTED	
Description	The CEO has a partnership mindset: s/he values and leverages the power of networks. Is leveraging the 1,800+ United Ways, its collective buying power, 11,000+ employees, 30,000+ board members, and United Way's breadth of community presence, relationships, and strategies. Provides leadership at the local, regional, national, and global level.
Attributes & Behaviors	<ul style="list-style-type: none"> - Fosters trust, interdependence and collaboration: Acts as a convener, helping community/non-profit/business leaders and other United Ways meet and engage with one another; Connects, and collaborates across sectors in the community. - Values external networks and relationships, builds coalitions: Knows key influencers in the community; Builds and invests in networks, external knowledge and learning opportunities; Utilizes established network of relationships to seek information of strategic importance and to seek a position of influence in key forums. - Links local, regional, national, and global perspectives: Participates and is active in regional, national, and global United Way efforts that have strategic payoffs for his/her organization; Initiates communication and collaborative activities across organizational boundaries.

	<ul style="list-style-type: none"> - Enables distributed leadership: Actively promotes and communicates within the United Way network the importance of aligning around a common agenda and shared aspirations to drive network wide results. - Leverages the collective power of United Way network: Constantly champions United Way; Builds relationships with United Ways based on mutual trust, respect, and commitment; Builds upon identified strengths and assets, and works to increase capacity of all United Ways and the network, and improve shared value for United Way. - Values inclusiveness: Develops, implements and evaluates collaborative and partnering strategies, such as coalition advocacy groups to involve all constituencies and stakeholders; Models and facilitates integration of cultural sensitivity and competence; Brings diverse groups and points of view “to the table” and to a common agenda.
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United Way Professional (CORE) Competencies

(All Staff – Core Competencies including CEO)

MISSION-FOCUSED

Description	The United Way Pro’s top priority is to create real social change that leads to better lives and healthier communities. This competency drives their performance and professional motivations.
Attributes & Behaviors	<ul style="list-style-type: none"> - Links donor, volunteer, and advocates’ aspiration to needs: Communicates effectively and with passion “the story” of the organization’s work to engage and energize donors, volunteers, advocates, and all other constituents in the community. - Catalyzes others’ commitment to mission: Personally and visibly participates in key events and opportunities. - Strives vigorously to accomplish shared goals: Communicates and/or initiates actions on strategic opportunities (e.g., organizes volunteer events, shares information about organization’s events and invites others to participate, etc.). Develops relationships to enhance and contribute to organizational effectiveness. - Separates one’s own interests from organizational interests to make the best possible judgments for the organization: Focuses own work and that of others on needs and aspirations of the community.

RELATIONSHIP-ORIENTED

Description	The United Way Pro understands that people come before process and is astute in cultivating and managing relationships toward a common goal.
Attributes & Behaviors	<ul style="list-style-type: none"> - Understands what motivates individuals and organizations: Acknowledges and thanks others for their contribution. Initiates contact and interacts in a constructive way with diverse people to generate enthusiasm for the work. - Values diversity and inclusion: Builds relationships internally and with other United Ways, United Way Worldwide, state and local governments, nonprofit and private sector organizations. - Effectively communicates: Knows and can successfully articulate the organization’s mission, vision and values to other stakeholders and collaborators. - Treats others with respect and dignity: Allocates time for relationship building, consciously creates time for engaging with others and deepening relationships. Embraces conflict and can successfully navigate the conversation to describe the organization’s interests and find appropriate solutions. - Actively listens to and facilitates diverse input and contributions: Helps others achieve their goals by sharing ideas, time and resources. Listens to others and communicates in an effective manner that fosters open communication.

COLLABORATOR

Description	The United Way Pro understands the roles and contributions of all sectors of the community and can mobilize resources (financial and human) through meaningful engagement.
Attributes & Behaviors	<ul style="list-style-type: none"> - Seeks and shares knowledge of community: Builds consensus and support with diverse stakeholders by exchanging information, identifying mutual interests, suggesting collaborative approaches and/or offering compromises. - Takes collaborative approach to addressing issues: Demonstrates coalition-building skills with the ability to explain, advocate and articulate facts and ideas in a persuasive manner and to negotiate with individuals and groups both internally and externally. Gives credit and recognition to others who have contributed. - Focuses on shared goals: Works collaboratively with others to achieve common goals and positive results. Supports and encourages other team members to achieve objectives. - Mobilizes a broad range of sectors and resources: Displays strong listening skills and can clearly state the point of view of others. Demonstrates ability to negotiate and compromise without losing sight of core values and objectives; seeks win-win solutions.

RESULTS-DRIVEN

Description	The United Way Pro is dedicated to shared and measurable goals for the common good; creating, resourcing, scaling, and leveraging strategies and innovations for broad investment and impact.
Attributes & Behaviors	<ul style="list-style-type: none"> - Focuses on results and can effectively communicate goals and impact: Sets and maintains high performance standards for self and others that support the organization's strategic plan. - Advocates for support of education, income, and health: Motivates others to translate ideas into actions and results. - Promotes innovation / willing to take risks: Takes calculated risks to achieve goals. Challenges self and others to achieve "stretch" goals. - Develops relationships to drive resources and results: Recognizes and capitalizes on opportunities to capture, grow, and attain funding and other resources that advance United Way's mission. Shows passion for improving the delivery of services with a commitment to continuous improvement. - Delivers on the business model: Holds self and other team members accountable for achieving results. Models excellence and motivates fellow members to follow his/her example.

BRAND-STEWARD

Description	The United Way Pro is a steward of the brand and understands his/her role in growing and protecting the reputation and results of the greater network.
Attributes & Behaviors	<ul style="list-style-type: none"> - Acts with integrity and strong ethics to foster trust at all levels (personal, market, societal): Fosters and supports the principles and values of the organization. - Internalizes the meaning and commitment of United Way and consistently acts according to its value and purpose: Defines, communicates and consistently exemplifies the organization's values and ethics. Understands brand concepts and can articulate these to stakeholders and staff. - Demonstrates the values of the network; is a good system-citizen: Identifies underlying issues that impact negatively on people and takes appropriate action to rectify the issues. Identifies, assesses and manages risk while striving to attain objectives. - Is accountable and transparent with all stakeholders: Respects and follows the standards and safeguards that protect the organization's integrity (e.g., professional standards for financial reporting, integrity of data, security of information systems, use of emails, organizational property, etc.).

Customizing CEO Competencies for Your United Way

You need to customize the competency model to reflect the unique needs of your organization. Board Leaders must work to select competencies (attributes and behaviors) from the model that are critical to the success of the organization. We recommend you consider the relative importance of the attributes and behaviors for each competency set based on your United Way's unique needs and goals.

Board Leaders should discuss and review competencies and attributes for United Way Chief Executive Officer. All five CEO specific competency sets are important – you should work to customize attributes and behaviors.

Carefully review each attribute and behaviors, discuss and consider what is most important for your United Way, the factors that affect and drive your United Way's performance in successfully advancing the mission. Those attributes and behaviors reflecting the unique needs and requirements for your United Way should be selected and used in the Chief Executive Officer Competency model for your United Way.

The Board may decide some that are not in the competency model – however, highly important for unique needs and requirements of your United Way.

- Enter all five CEO competencies (all competencies are important for the role, not negotiable).
- Discuss and rate attributes, using **"H"** (high importance) to identify those that are absolutely critical to your United Way's success at this time.
- Next, rate the rest of the attributes either **"M"** (medium importance at this time) or **"L"** (low importance at this time).
- All competencies are important, and the attributes you rate an "H" should be used to drive your hiring and/or continuing development efforts.
- "Core Competencies" are mandatory for ALL United Way professionals.

Competency	Attribute	Rating: H, M, L
(e.g. – Visionary)	<i>Is visionary thinker</i>	
	<i>Inspirational and persuasive communicator</i>	
	<i>Displays courage, resilience and entrepreneurial spirit</i>	

CEO Work Plan (Sample Form)

Organizational Goal or Objective: <i>(List one strategic objective that you intend to focus on this year.)</i>	CEO Actions to Support the Organizational Goal: <i>(List the actions that you will take to support and reach the organizational goal listed.)</i>	Specific Measurable Outcome: <i>(List the specific measurable outcome that you hope to attain by investing time in this action.)</i>	Communication: <i>(List the way you will communicate the action plan and the updates to your work.)</i>
Organizational Goal:	Action:	Measurable outcomes:	Quarterly Update Method and/or Board Meeting Date:
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Organizational Goal:	Action:	Measurable outcomes:	Quarterly Update Method and/or Board Meeting Date:

CEO Development Plan (Sample Form)

The following steps are a sample of what you may want to do with your development plan system:

- Column #1 - The CEO will choose one organizational objective to focus on and list it here. This objective may be determined by the strategic plan approved by the board.
- Column #2 – In this section, the CEO will specifically share the action that he/she plans to take in the following year to support or reach the organizational objective.
- Column #3 – This section lists the specific measurable outcome(s) that will occur as a result of the action taken.
- Column #4 – The CEO will list how he/she plans to communicate progress on the work plan. This update can be most effective if done quarterly. This way the CEO can request alterations or additional tools or assistance from the board to reach the goal. The update might include:
 - The actions taken to date
 - What actions are left to be taken
 - Progress and/or challenges that were unexpected
 - Status of what is left to be done

CEO Development Plan

Core Competency: (List one objective/core competency that you intend to pursue/improve.)	CEO Actions to Develop the Core Competency Listed: (Put the training or development activity that you will participate in, who offers it, and when it takes place.)	Date to be completed by: (Mark the date that you will complete the action.)	Specific Measurable Outcome: (List the specific measurable outcome that you hope to attain by investing time in this action.)	Board Meeting Dates CEO will present a Progress Update on CEO Development Plan actions: (List the bi-annual board meeting date when you will give a progress update on your CEO Work Plan actions.)
Core Competency: <i>Change Leadership</i>	Action: <i>Attend executive development session focused Change Leadership for CEOs.</i> Offered by What Organization: <i>United Way Worldwide at Staff Leaders' Conference</i> Dates this activity is offered: <i>May 2018</i>	Completion Date: <i>May 2018</i>	Measurable outcomes: <i>To vet change strategies related to the redesign of our community investment process with 2 stakeholder groups and gain support for moving the strategies forward.</i>	Board Meeting Date: <i>December 2017</i>
Core Competency:	Action: Offered by What Organization: Dates this activity is offered:	Completion Date:	Measurable outcomes:	Board Meeting Date:

Combined Work Plan and Pay-for-Performance Plan (Sample Form)

Organizational Goal or Objective: <i>(List one strategic objective that you intend to focus on this year.)</i>	CEO Actions to Support the Organizational Goal: <i>(List the actions that you will take to support and reach the organizational goal listed.)</i>	Specific Measurable Outcome: <i>(List the specific measurable outcome that you hope to attain by investing time in this action.)</i>	Communication: <i>(List the way you will communicate the action plan and the updates to your work.)</i>	Pay-for-Performance Incentive: <i>(List the specific measurable incentive that will occur as a result of reaching the listed objective or objectives in total.)</i>
Organizational Goal:	Action:	Measurable outcomes:	Quarterly Update Method and/or Board Meeting Date:	<p>Is the incentive granted annually/semi-annually/quarterly?</p> <p>What incentive will the CEO receive?</p> <p>Is the incentive tied to one objective, all objectives or by reaching most objectives?</p>
Organizational Goal:	Action:	Measurable outcomes:	Quarterly Update Method and/or Board Meeting Date:	<p>Is the incentive granted annually/semi-annually/quarterly?</p> <p>What incentive will the CEO receive?</p> <p>Is the incentive tied to one objective, all objectives or by reaching most objectives?</p>

CEO Performance Review (Sample Form)

CEO Performance Evaluation

CEO Name: _____

Review Period Dates: _____

Reviewer Name(s): _____

Length of time the CEO has been in this position: _____

INSTRUCTIONS: This performance review is divided into four main areas. These include:

- CEO Work Plan from the previous year
- CEO Development Plan from the previous year
- Leadership Competencies
- Summary and Overall Rating

CEO Work Plan

- At the beginning of the review period, individual goals with specific organizational success factors that link to the board-approved Strategic Plan should be developed.
- At the end of the review period, the success toward attainment of the organizational goals is recorded.

CEO Development Plan

- At the beginning of the review period, individual development goals with specific learning and development success factors should be created.
- At the end of the review period, the success toward attainment of the development goals is recorded.

Leadership Competencies

- Each competency is designed to evaluate performance goals and standards.
- Rate each competency. Provide comments on individual performance.
- Select a rating from the rating scale that is supported by the comments.

Summary and Overall Rating

- The reviewer(s) completes the summary section with an overview of the individual's strengths and areas for improvement.
- Select a rating from the Rating Scale that is supported by the individual ratings as well as the associated comments.

RATING	DEFINITION
5 = Superior	Mastery over the essential skills and knowledge needed for the competency.
4 = Excellent	Demonstrates a high degree of expertise in all aspects of the competency.
3 = Meets Expectations	Performs the entire range of duties in a professional manner.
2 = Needs Improvement	Improvement is needed in performing essential duties satisfactorily.
1 = Unacceptable	Does not perform essential duties in a satisfactory way.

Part I.

CEO Work Plan Goals / Objectives

At the beginning of the previous review period, a CEO Work Plan was created. In the space provided below, record the organizational goal or objective, the CEO Action(s) to Support the Organizational Goal, the specific measurable outcome for each goal you listed last year and the actual outcome achieved. A rating will be recorded for each goal/objective listed in your CEO Work Plan.

Organizational Goal / Objective	CEO Action to Support this Goal / Objective	Specific Measurable Outcome(s)	Actual Outcome(s)	5=Exceeded 4=Met All 3=Met Most 2=Met Some 1=Did Not Meet
Goal:	Action:	Outcome(s):	Actual:	<input type="checkbox"/> 5 <input type="checkbox"/> 4 <input type="checkbox"/> 3 <input type="checkbox"/> 2 <input type="checkbox"/> 1
Goal:	Action:	Outcome(s):	Actual:	<input type="checkbox"/> 5 <input type="checkbox"/> 4 <input type="checkbox"/> 3 <input type="checkbox"/> 2 <input type="checkbox"/> 1
Goal:	Action:	Outcome(s):	Actual:	<input type="checkbox"/> 5 <input type="checkbox"/> 4 <input type="checkbox"/> 3 <input type="checkbox"/> 2 <input type="checkbox"/> 1
Goal:	Action:	Outcome(s):	Actual:	<input type="checkbox"/> 5 <input type="checkbox"/> 4 <input type="checkbox"/> 3 <input type="checkbox"/> 2 <input type="checkbox"/> 1

Part II.

CEO Development Plan Core Competency Goals and Objectives

At the beginning of the previous review period, a CEO Development Plan was created. In the space provided below, record the core competency, the CEO Action(s) to Support this Core Competency and date the action was to be completed, the specific measurable outcome(s) and the actual outcome achieved. A rating will be recorded for each actual outcome listed in your CEO Work Plan.

Core Competency	CEO Action(s) to Support this Core Competency & Date to be Completed	Specific Measurable Outcome(s)	Actual Outcome(s)	5=Exceeded 4=Met All 3=Met Most 2=Met Some 1=Did Not Meet
Core Competency:	Action:	Outcome(s):	Actual:	<input type="checkbox"/> 5 <input type="checkbox"/> 4 <input type="checkbox"/> 3 <input type="checkbox"/> 2 <input type="checkbox"/> 1
Core Competency:	Action:	Outcome(s):	Actual:	<input type="checkbox"/> 5 <input type="checkbox"/> 4 <input type="checkbox"/> 3 <input type="checkbox"/> 2 <input type="checkbox"/> 1
Core Competency:	Action:	Outcome(s):	Actual:	<input type="checkbox"/> 5 <input type="checkbox"/> 4 <input type="checkbox"/> 3 <input type="checkbox"/> 2 <input type="checkbox"/> 1
Core Competency:	Action:	Outcome(s):	Actual:	<input type="checkbox"/> 5 <input type="checkbox"/> 4 <input type="checkbox"/> 3 <input type="checkbox"/> 2 <input type="checkbox"/> 1

Part III.

CEO Competencies

CORE COMPETENCIES FOR ALL UNITED WAY PROFESSIONALS

Competency	Descriptions:	Overall Rating for each Competency: 5=Exceeded 4=Met All 3=Met Most 2=Met Some 1=Did Not Meet
Mission-Focused	Catalyze others' commitment to mission to create real social change that leads to better lives and healthier communities. This drives their performance and professional motivations.	<input type="checkbox"/> 5 <input type="checkbox"/> 4 <input type="checkbox"/> 3 <input type="checkbox"/> 2 <input type="checkbox"/> 1
Relationship-Oriented	Understands that people come before process and is astute in cultivating and managing relationships toward a common goal.	<input type="checkbox"/> 5 <input type="checkbox"/> 4 <input type="checkbox"/> 3 <input type="checkbox"/> 2 <input type="checkbox"/> 1
Collaborator	Understands the roles and contributions of all sectors of the community and can mobilize resources (financial and human) through meaningful engagement.	<input type="checkbox"/> 5 <input type="checkbox"/> 4 <input type="checkbox"/> 3 <input type="checkbox"/> 2 <input type="checkbox"/> 1
Results-Driven	Dedicated to shared and measurable goals for the common good; creating, resourcing, scaling, and leveraging strategies and innovations for broad investment and impact.	<input type="checkbox"/> 5 <input type="checkbox"/> 4 <input type="checkbox"/> 3 <input type="checkbox"/> 2 <input type="checkbox"/> 1
Brand Steward	Steward of the brand and understands his/her role in growing and protecting the reputation and results of the greater network.	<input type="checkbox"/> 5 <input type="checkbox"/> 4 <input type="checkbox"/> 3 <input type="checkbox"/> 2 <input type="checkbox"/> 1
Comments:		

CEO COMPETENCIES

Competency	Descriptions:	Overall Rating for each Competency: 5=Exceeded 4=Met All 3=Met Most 2=Met Some 1=Did Not Meet
Visionary	The CEO is the Chief Mission Officer, has a clear vision for the organization, confronts the complex realities of the environment and simultaneously maintains faith in a better future, providing purpose, direction, and motivation.	<input type="checkbox"/> 5 <input type="checkbox"/> 4 <input type="checkbox"/> 3 <input type="checkbox"/> 2 <input type="checkbox"/> 1
Organizational Leadership	The CEO demonstrates strategic leadership balanced with authenticity, respect for others, and trust building within the organization, with the Board, and stakeholders. Proactively drives an organization to a higher level of performance, efficiency, and growth through inspiring action and commitment for best results.	<input type="checkbox"/> 5 <input type="checkbox"/> 4 <input type="checkbox"/> 3 <input type="checkbox"/> 2 <input type="checkbox"/> 1
Influence in the Marketplace	The CEO has growth mindset, builds and cultivates network of relationships, is influential and leverages United Way's unique position to proactively increase visibility, reputation, and competitive advantage that generates interest, passion for investing in community. Successfully navigates the complex dynamics of local, regional, and national environment.	<input type="checkbox"/> 5 <input type="checkbox"/> 4 <input type="checkbox"/> 3 <input type="checkbox"/> 2 <input type="checkbox"/> 1
Grow Business and Revenue	The CEO possesses a high-level of business acumen and broad management skillset, is effective at generating and growing financial support for the organization. Is able to raise funds by effectively engaging and linking a variety of donors (individuals, corporations, major giving, and other segments) and volunteers to inform and contribute to advancing the mission.	<input type="checkbox"/> 5 <input type="checkbox"/> 4 <input type="checkbox"/> 3 <input type="checkbox"/> 2 <input type="checkbox"/> 1
Partnership Mindset and Network-Oriented	The CEO has a partnership mindset: s/he values and leverages the power of networks; Is leveraging the 1,800+ United Ways, its collective buying power, 11,000+ employees, 30,000+ board members, and United Way's breadth of community presence, relationships, and strategies. Provides leadership at the local, regional, national, and global level.	<input type="checkbox"/> 5 <input type="checkbox"/> 4 <input type="checkbox"/> 3 <input type="checkbox"/> 2 <input type="checkbox"/> 1
Comments:		

Part IV. Summary and Overall Rating

Select what you see as the performance trend:

- ☐ Improving
☐ Declining
☐ Steady
☐ Too new in position to rate trend

For weighted combined rating, list the ratings you have assigned from the previous sections. Take each rating times the relative weight percentage listed to get a weighted rating. Then ADD the weighted ratings together to get the overall results within a possible top rating of 5.

For Weighted Combined Rating: Relative Weight x Rating = Weighted Rating

Part I - CEO Work Plan 50% x =

Part II - CEO Development Plan 25% x =

Part III - Leadership Competencies 25% x =

100% /
Overall Results

Strengths:

Opportunities for Development:

Select an overall rating for Sections I (CEO Work Plan), II (CEO Development Plan) and III (Leadership Competencies).

Record the Overall Rating result:

- ☐ 5
☐ 4
☐ 3
☐ 2
☐ 1

CEO's Feedback:

Signatures:

Date:

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