

Controller Evaluation Form

Employee Name _____	Department _____	Period Covered _____
Evaluated by _____	Date Completed _____	Date Reviewed with Employee _____

	Weight <small>Total must equal 100%</small>	Rating <small>Use 1 through 5</small>	Score <small>Weight x Rating</small>
<p>Administration</p> <p>Structures activities of groups, individuals, and self.</p> <p>Uses resources to maximize productivity and efficiency.</p> <p>Plans, sets goals, and develops strategies to meet goals.</p> <p>Efficiently uses time and energy.</p> <p>Comments:</p>			
<p>Leadership</p> <p>Gains understanding, support, and effective action of others to achieve objectives.</p> <p>Sets and maintains high standards.</p> <p>Builds collaborative team atmosphere.</p> <p>Takes charge and responds appropriately to unexpected situations.</p> <p>Comments:</p>			

Rating System

5 - Outstanding 4.5 to 4 - Above standards 3.5 to 3 - Met standards 2.5 to 2 - Below standards 1 - Unacceptable

Controller Evaluation Form, Page 2

	Weight Total must equal 100%	Rating Use 1 through 5	Score Weight x Rating
<p>Interpersonal Skills</p> <p>Develops relationships that enhance understanding, respect, and communication.</p> <p>Deals effectively with conflict.</p> <p>Works as a team player.</p> <p>Comments:</p>			
<p>Problem-Solving Skills</p> <p>Effectively processes and analyzes information to learn new material, identify and define problems, and make decisions.</p> <p>Uses quantitative and financial analyses to make sound decisions.</p> <p>Comments:</p>			
<p>Communications</p> <p>Communicates clearly, accurately, thoroughly, and effectively.</p> <p>Comments:</p>			

Rating System

5 - Outstanding 4.5 to 4 - Above standards 3.5 to 3 - Met standards 2.5 to 2 - Below standards 1 - Unacceptable

Controller Evaluation Form, Page 3

	Weight Total must equal 100%	Rating Use 1 through 5	Score Weight x Rating
<p>Motivation</p> <p>Establishes high performance standards for self.</p> <p>Sets challenging goals.</p> <p>Demonstrates commitment to the cooperative.</p> <p>Comments:</p>			
<p>Personal Adaptability</p> <p>Demonstrates self confidence in handling work challenges.</p> <p>Demonstrates flexibility, adaptability, and integrity when facing frustration or adversity.</p> <p>Comments:</p>			
<p>Technical Knowledge</p> <p>Understands thoroughly technical fundamentals of the job.</p> <p>Stays informed of technical developments.</p> <p>Understands company practices and techniques.</p> <p>Recognizes the significance of technology specific to the cooperative.</p> <p>Comments:</p>			

Rating System

5 - Outstanding 4.5 to 4 - Above standards 3.5 to 3 - Met standards 2.5 to 2 - Below standards 1 - Unacceptable

Controller Evaluation Form, Page 4

	Weight Total must equal 100%	Rating Use 1 through 5	Score Weight x Rating
<p>Supervision</p> <p>Monitors office activities to ensure optimum efficiency.</p> <p>Comments:</p>			
<p>Training</p> <p>Oversees employee training.</p> <p>Comments:</p>			
<p>Administration</p> <p>Develops procedures for branch locations.</p> <p>Monitors branch performance.</p> <p>Comments:</p>			
<p>Management Information Coordination</p> <p>Coordinates and disseminates information for management's use.</p> <p>Comments:</p>			

Rating System

5 - Outstanding 4.5 to 4 - Above standards 3.5 to 3 - Met standards 2.5 to 2 - Below standards 1 - Unacceptable

Controller Evaluation Form, Page 5

	Weight Total must equal 100%	Rating Use 1 through 5	Score Weight x Rating
<p>Accounting System Coordination</p> <p>Develops and oversees accounting system activities for optimum efficiency. Comments:</p>			
<p>Reporting</p> <p>Develops and submits required reports to management by agreed upon dates. Comments:</p>			
<p>Recordkeeping</p> <p>Prepares and distributes customer and employee records. Comments:</p>			
<p>Service</p> <p>Provides and promotes exceptional service. Comments:</p>			

Rating System

5 - Outstanding 4.5 to 4 - Above standards 3.5 to 3 - Met standards 2.5 to 2 - Below standards 1 - Unacceptable

Controller Evaluation Form, Page 6

	Weight Total must equal 100%	Rating Use 1 through 5	Score Weight x Rating
<p>Maintenance</p> <p>Maintains the office and equipment.</p> <p>Comments:</p>			
<p>Other Duties</p> <p>Upholds cooperative policies.</p> <p>Performs other duties as assigned by management.</p> <p>Enforces and upholds the cooperative's credit policy.</p> <p>Comments:</p>			
<p>Total Score =</p>			

Rating System

5 - Outstanding 4.5 to 4 - Above standards 3.5 to 3 - Met standards 2.5 to 2 - Below standards 1 - Unacceptable

Controller Evaluation Form, Page 7

Weight Total must equal 100%	Rating Use 1 through 5	Score Weight x Rating
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Overall Merit Rating

- 451 - 500 - Outstanding
- 351 - 450 - Exceeds Standards
- 251 - 350 - Met Standards
- 151 - 250 - Below Standards
- 100 - 150 - Unacceptable

Signature of Manager/Supervisor _____ Date_____

Signature of Employee _____ Date_____

Rating System

5 - Outstanding **4.5 to 4** - Above standards **3.5 to 3** - Met standards **2.5 to 2** - Below standards **1** - Unacceptable