

## Credit Manager 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><b>Credit Application Processing</b></p> <p>Processes all credit applications.</p> <p>Comments:</p>			
<p><b>Credit Policy</b></p> <p>Enforces and upholds the cooperative's credit policy.</p> <p>Comments:</p>			
<p><b>Check Acceptance Procedure</b></p> <p>Develops and enforces a check acceptance procedure.</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

**Credit Manager Evaluation Form, Page 2**

	<b>Weight</b> Total must equal 100%	<b>Rating</b> Use 1 through 5	<b>Score</b> Weight x Rating
<p><b>Debt Collection</b></p> <p>Actively works to recover debts owed to the cooperative.</p> <p>Comments:</p>			
<p><b>Reporting</b></p> <p>Informs general manager on the status of accounts.</p> <p>Comments:</p>			
<p><b>Profitability</b></p> <p>Establishes and achieves profitability goals identified in the annual budget.</p> <p>Comments:</p>			
<p><b>Job Knowledge</b></p> <p>Understands the requirements of the job.</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

**Credit Manager Evaluation Form, Page 3**

	<b>Weight</b> Total must equal 100%	<b>Rating</b> Use 1 through 5	<b>Score</b> Weight x Rating
<p><b>Quality of Work</b></p> <p>Work is accurate and neat.                      Comments:</p>			
<p><b>Quantity of Work</b></p> <p>Consistently performs an adequate amount of satisfactory work.                      Comments:</p>			
<p><b>Cooperation</b></p> <p>Works well and effectively with co-workers and supervisors.                      Supports company policies and goals.                      Comments:</p>			
<p><b>Initiative</b></p> <p>Begins assignments without direction and recognizes the best way of accomplishing tasks.                      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

**Credit Manager Evaluation Form, Page 4**

	<b>Weight</b> Total must equal 100%	<b>Rating</b> Use 1 through 5	<b>Score</b> Weight x Rating
<p><b>Attendance and Dependability</b></p> <p>Can be relied upon to report to work and stay on the job.                      Comments:</p>			
<p><b>Problem Solving</b></p> <p>Handles on the job problems.                      Comments:</p>			
<p><b>Other Duties</b></p> <p>Performs other duties as assigned by the general manager.                      Comments:</p>			
<p><b>Total Score =</b></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

**Credit Manager Evaluation Form, Page 5**

<b>Weight</b> Total must equal 100%	<b>Rating</b> Use 1 through 5	<b>Score</b> 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