

Self-Evaluation Form

Employee Name: Joanne Cheechoo	Job Title: Finance Coordinator
Date: February 9, 2024	

Please complete the following information to help prepare for your performance review. Use the spaces provided to include appropriate comments about your job and your performance.

1. What do you consider to be the top three to five priorities of your job as you understand them?

- Working Closely with Finance Director, Payroll Officer, Travel Coordinator, Human Resource Manager, Executive Director, and Managers.
- Accounts payable, to ensure all invoices are paid in a timely manner.
- Board, Staff advances, expenses and claims are monitored and processed.
- Budget reviews and update chart of accounts
- Monitor all mobility cells and ensure all staff are adhering to policy and usage of cell phones.

2. What do you see as your greatest accomplishment or successful efforts since the beginning of your employment with Nishnawbe-Aski Legal Services Corporation?

- Set up the EFT with all staff, vendors, and board members to make payment processing easier as cheque signers were not always available.
- Set up a list of staff, locations, and programs.
- Monitoring staff travel
- Processing all requests to set up new office phones, faxes and internet when required.
- File management with colour coding files such AP, Rent, Staff Travel, Visa's, EFT, Journal Entry and Board.
- Very organized

3. In what area or areas would you like to gain more experience, training, or education?

- To take the Advance Microsoft Excel training
- Training for personal self-growth and team building
- To assist with Bank reconciliation

4. What activities or training have you participated in to develop yourself professionally?

- Microsoft Excel – Introductory Level Nov 2022
- Adagio PayDirt, Accounts Payable & General Ledger as a refresher in Oct 2023
- Management Training Jan 2024

5. What could you do to perform your job duties and assigned tasks more efficiently?

- Update Finance policies and procedures.
- Remind staff to review HRIS Manual, HR Policy and Finance Policy.
- Be more informed about any updates and changes of staffing.
- Have managers refer to their Chart of Accounts and Budgets when approving expenses, purchase orders and other requisitions so that they are more accountable to their finance budgets. This has been requested multiple times since Feb 2018 and continuously every year since being employed.
- Staff should have copies of the Chart of Accounts to ensure that they are coding properly as well, however Manager can change codes when approving.
- Ensure that purchase orders are used for all orders such as supplies, renovations, brochures, freight, business cards and other promotional items.
- Travel advances to be submitted before noon Wednesday for processing which should be approved by manager with correct coding.
- Staff need to ensure receipts are uploaded to HRIS before being approved by the manager. Debit receipts are not acceptable, except for taxi receipts.
- Third party payments, ensure that all details are included such as mailing address, banking information (if applicable), email address and contact information. Also attach an invoice to support cheque requisitions.
- Finance needs to be informed of any cancelled trips as Purchase Orders are filed and outdated when year-end comes.
- Visa reconciliation should be submitted in a timely manner. Both Statements and Receipts should match receipts and visa statement and send in as one document.
- Finance should assist with Orientation Procedures such as HRIS Manual, Policies and Payroll

6. What are your primary *goals and objectives for the organization as the Finance Coordinator*.

- Continue to be more effective and efficient with my job duties in the accounts payable position.
- Continue to be a team player with all departments.

7. What kinds of professional development activities would you like to do during the coming year?

- Training for personal self-growth and team building.

8. Other Comments:

- Going over and above my job description. Doing other job duties that were not in my job description.
- Managed the finance department on my own for about 8 months.
- Training staff that joined the Finance department.