

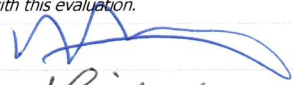



DIRECTOR OF FINANCE
Employee Performance Review

| EMPLOYEE INFORMATION | |
|-------------------------------|-------------------------|
| Name Terry Bortolin | Employee ID |
| Job Title Director of Finance | Date Sept, 19, 2023 |
| Department Finance | Manager Irene Linklater |
| Review Period | 3 month probation |

| RATINGS | |
|----------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | 1 = Poor 2 = Fair 3 = Satisfactory 4 = Good 5 = Excellent |
| Job Knowledge | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> |
| <i>Comments</i> | Terry possesses excellent knowledge of Director of Finance duties that is applied professionally and consistently. Kept self up to date on multiple Org. Funding Agreements, met with funders, completing funder reports. Works respectfully with managers to budgets and report deadlines. Assists and advises Executive Director regularly on Finance and office moving. |
| Work Quality | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> |
| <i>Comments</i> | Fulfills duties and decision making for NAN LEGAL's internal control functions, problem solving, cash management, GAAP, administration and staff supervision and supports staff. Prepared and presented financial statement report to the Board as a standing agenda item. Mentoring and training new finance staff. Works well with Staff. |
| Attendance/Punctuality | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> |
| <i>Comments</i> | Excellent attendance and punctual to in-person or virtual meetings. |
| Initiative | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> |
| <i>Comments</i> | Contacts Funders, Banker, consultants, service providers to assess best practice needs for NAN LEGAL. Asks questions, provides clarification on issues to raise with staff budget management, HR matters to staff salary inquiries & recruitment. Leadership to Finance Dept in building positive relations with new landlord, funders, IT and other consultants, conducted staff training on new finance reporting, provided direction to relocation exit and settling into new office. Travelled to SL |
| Communication/Listening Skills | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> |
| <i>Comments</i> | Excellent. Provides. Provides advice and rationale to issues and solutions. Expresses concern on need for team building of managers & staff and willing and able to be part of solution to contribute to positive workplace environment. |
| Dependability | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> |
| <i>Comments</i> | Reliable, always in-the-office. Reports prepared independently and consults with former Finance Consultant Advisor as necessary during transition. Ready to contribute to operational and management issues for decisions and proposes action to serve the needs of protecting NANLEGAL to risk management and liabilities. |
| Overall Rating (average the rating numbers above) | 5 - Excellent |

| EVALUATION | |
|----------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ADDITIONAL COMMENTS | Terry's positive attitude and respectful professionalism brings added value to NAN LEGAL. Probationary period has been met successfully. |
| GOALS (as agreed upon by employee and manager) | Terry identified working on Finance Reporting to ensure Directors and Managers trained on new finance electronic systems. To meet as many communities Leadership Representatives as possible as travel budgets permit. The AGM September 2023 was a great beginning. To keep abreast of operational budgets to identify unrestricted funds for meeting salaries and increased travel. |

| VERIFICATION OF REVIEW | |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|
| <i>By signing this form, you confirm that you have discussed this review in detail with your supervisor. Signing this form does not necessarily indicate that you agree with this evaluation.</i> | |
| Employee Signature  | Date Sept. 20/23 |
| Manager Signature  | Date Sept. 20/23 |

Goals and Performance Plan (GPP) – due by DATE and reviewed by DATE;

Date: **NOT
REQUIRED**

Name of employee:

Name of supervisor:

Employee's main goals for this year:

How progress towards the goals will be measured:

Next meeting date:

Self-Evaluation Form

Employee Name: Terry Bortolin Job Title: Director of Finance

Date: September 18, 2023

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?

- Balanced budgets
- Overseeing Staff.
- Mentoring and Coaching Staff
- Financial Reporting
- Relationship Building

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

- Hiring and training the finance team as well as getting us caught up on the many reports that were due.

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

- Adagio, PayDirt and experience in specific programs

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

- Certificate in HR, Certificate in Charity NPO's, C.A and a planned Adagio training session.

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

→ Intigrate many of our programs to help gain efficiencies. Train staff on finance.

6. What are your primary goals and objectives for your position and program as a Director of Finance worker?

→ Balanced program budgets

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

→ HR training and Adagio advanced course.

8. Other Comments:

None.