



POSITION TITLE

Employee Performance Review

EMPLOYEE INFORMATION

Name *Josh Swauger*
Job Title *Finance Director*
Department
Review Period

Employee ID
Date *Sept 16/24*
Manager

RATINGS

1 = Poor 2 = Fair 3 = Satisfactory 4 = Good 5 = Excellent

	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>	<i>great understands position & vision of Corporation</i>				
Work Quality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<i>Comments</i>	<i>great <u>Delegate!</u></i>				
Attendance/Punctuality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<i>Comments</i>	<i>great</i>				
Initiative	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<i>Comments</i>					
Communication/Listening Skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<i>Comments</i>					
Dependability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<i>Comments</i>					

Overall Rating (average the rating numbers above)

EVALUATION

ADDITIONAL COMMENTS

agree upon recommendation Based on additional Job duties performance Salary Band 13 great &

GOALS

(as agreed upon by employee and manager)

Goals and Performance Plan (GPP) – due by January 31st, reviewed in July

Date:	Name of employee:	Name of supervisor:
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Employee's main goals for this year:

Working w HR closer.
reforming HR Department
HR Policies & EOA
Financial policies - redone.
MGMT TRAINING.
- Meeting Funders.

! Policy Procedures.
- Enforcement.

How progress towards the goals will be measured:

Next meeting date:

Self-Evaluation Form

Employee Name: Joshua Swearingen Job Title: Director of Finance

Date: September 16, 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? No specific order:
 - Manage the finance department and its team members. Review and approve finance related items.
 - Establish and maintain strong working relationships with NALSC's various funders.
 - Complete financial reports and collect programming reports and submit them to the funders
 - Ensure the financial policies are adhered to by all staff members.
2. What do you see as your greatest accomplishment or successful efforts since the beginning of your employment with Nishnawbe-Aski Legal Services Corporation?
 - Successfully taking over as Director of Finance and cleaning up the records and accounting.
 - Assisting in finding a new Finance Office for the finance team
 - Assisting managers through accounting and financial training
 - Helping develop the LAO service proposal and other Funder contracts/Agreements
3. In what area or areas would you like to gain more experience, training or education?
 - Additional legal system knowledge as it pertains to our Organization in North Western Ontario and the programs we run
 - Additional designations beneficial to my role (Certified Fraud Examiner, Certified Internal Auditor)
 - Additional knowledge and understanding of all the programs we offer
4. What activities or trainings have you participated in to develop yourself professionally?
 - Management Training (both general and NALSC specific)
 - Adagio Software Training (This includes Adagio and PayDirt)
 - Various Funder Meetings (Met w LAO / MCCSS / DOJ / MAG in person)
 - Completed the Auditing Process from an Organization standpoint.
 - Various PD courses

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

- Continue to improve on delegating tasks that can be completed by others
- Do not try to do everything myself. Try to ask others for help.
- Ensure vacations are planned during slow periods and timed well with other finance team members.

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

- Establish permanent roles and responsibilities for the finance team and its employees
- Improve and update the financial policies and procedures for the organization
- Continue to look for additional funding with existing funders
- Expand funding opportunities by building relationships with new funders

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

- Training related to maintaining my CPA designation
- Training related to obtaining additional designations.
- Learning more on the programs we offer and how they work within our legal system

8. Other Comments:

- I feel I have helped with programming in my role in addition to my finance director role
- I will act as ED during other Directors' leaves. I also assist other Directors with decision
- I am continuing to develop my skills and knowledge by seeking to obtain practical professional designations.
- I feel I greatly improved and fixed financial reporting to our Funders.

Raise Request : 6% increase to \$121,184 from \$114,227