



MANAGER OF FINANCE

Employee Performance Review

EMPLOYEE INFORMATION

Name	Joshua Swearengen	Employee ID	
Job Title	Finance Manager	Date	November 2023
Department	Finance	Manager	Terry Bortolin
Review Period	3 Month Probationary Period		

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>	Very knowledgeable on all accounting aspects and excellent job taking your time to learn the staff and the systems and programs in place.				
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, administration and staff supervision and supports staff. 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>	Took the lead to prepare bi-weekly management meetings to further staff development, willing to contact funders, services providers and others as necessary in order to ensure priorities and deadlines are met.				
Communication/Listening Skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<i>Comments</i>	Excellent. Provides advice and rationale to issues and solutions. 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. 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)					

EVALUATION

ADDITIONAL COMMENTS Josh's positive attitude, professionalism and accounting knowledge add significant value to NAN Legal. Probationary period has been successfully met.

EMPLOYEE INFORMATION

Name Joshua Swearingen

Employee ID

Job Title Finance Manager

Date November 2023

Department Finance

Manager Terry Bortolin

Review Period
3 Month
Probationary
Period**GOALS***(as agreed upon by
employee and manager)*

To meet with as many managers as possible to further their budget management understanding.

Further his knowledge of NAN territory.

Ensure he continues to get professional training as it pertains to his position and that it benefits NAN Legal.

VERIFICATION OF REVIEW

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.

Employee Signature



Date Nov 22, 2023

Manager Signature



Date NOV. 2023

Self-Evaluation Form

Employee Name: Joshua Swearingen	Job Title: Finance Manager
Date: November 20 th . 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?
 - Assist with completing funder reports - Provide support and answer employee questions
 - Review Bi-weekly payroll runs and weekly EFT runs (and approve them)
 - Review daily, monthly and semi-annual transactions (and approve them)
 - Maintain up to date and clean accounting records and support for audits
 - Prepare monthly bank reconciliations
2. What do you see as your greatest accomplishment or successful efforts since the beginning of your employment with Nishnawbe-Aski Legal Services Corporation?
 - Cleaned up the bank reconciliations
 - Created an employee wage worksheet and reallocated wages to the correct programs
 - Assisted the set-up of payroll imports
3. In what area or areas would you like to gain more experience, training or education?
 - I want to gain additional experience / knowledge on payroll. This includes the rules and calculations surrounding employee deductions
 - I also want to learn more about the benefits and pension we offer
 - I am always looking to learn more about Adagio programs
4. What activities or trainings have you participated in to develop yourself professionally?
 - 3 day long Adagio and Paydirt Training in Winnipeg
 - Leadership session / conference
 - All-staff Gathering

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

- Obtain more knowledge on the accounting software (Adagio)
- Seek additional knowledge from my fellow colleagues
- Look for additional training opportunities
- Do some personal research on the tasks and job duties

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

- Complete my first audit as a Finance Manager
 - Make payroll processes more automatic
 - Improve state of record keeping of the Organization
 - Assist my Finance team complete their goals and objectives
- Become primary contact for funders and their questions

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

- Would like to work towards obtaining my CFE (Certified Fraud Examiner) credential
- Would like to work towards obtaining my CIA (Certified Internal Auditor) credentials
- Need to obtain 40 professional development hours for my CPA

8. Other Comments:

- Looking to obtain