

FINANCIAL CONTROLLER

Employee Performance Review



HERE

EMPLOYEE INFORMATION

Name	Tara Thompson	Employee ID	
Job Title	Financial Controller	Date	October 28-2022
Department	ADM	Manager	Irene Linklater Executive Director
Review Period	2021-2022	Last Performance Evaluation:	2021-11-18

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"/>	*X <input type="checkbox"/>
<i>Comments</i>	Tara possesses excellent knowledge of Financial Controller duties that she applies professionally and consistently. Keeps up to date on Funding Agreements, meets with funders, completes funder reports and works with managers to meet report deadlines. Assists and advises Executive Director regularly. Understands and advises staff on Finance Policy.				
Work Quality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	X <input type="checkbox"/>
<i>Comments</i>	Competently fulfills duties and decision making for NALSC's internal control functions, cash management, general ledger management, administration and staff supervision and supports staff. Prepares and presents financial statement reports to the Board as a standing agenda item. Mentors and trains new finance staff.				
Attendance/Punctuality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	X <input type="checkbox"/>
<i>Comments</i>	Excellent attendance. Leave requests prepared as required.				
Initiative	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	X <input type="checkbox"/>
<i>Comments</i>	Contributes to Managers meetings and Board Meetings. Asks questions and provides clarification on issues to be raised and resolved to having policies applied equally to all staff. Provides background to past practices and options. Initiated partnership with Confederation College for student placement in finance that supports NALSC staff recruitment.				
Communication/Listening Skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	X <input type="checkbox"/>
<i>Comments</i>	Excellent. Provides concerns of no-policy compliance of management and prepared to address directly and respectfully. Provides advise and rationale to issues and solutions. Expresses concerns on need for team building of managers & staff				
Dependability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	X <input type="checkbox"/>
<i>Comments</i>	Capably takes on Acting Executive Director functions when delegated. Always in-the-office. Reports prepared on time. Ready to contribute to management issues for decisions. Asks the tough questions that need to be raised for management and proposes action to serve the needs of protecting NALSC and staff.				
Overall Rating (average the rating numbers above)	5				

EVALUATION

ADDITIONAL COMMENTS Tara takes on other tasks all the while having a heavy workload at Finance due to current staff shortage to a growth of funding that in turn increases finance responsibilities in books management & reporting and overall work balance management. Contributed to planning for manager's session for a new operational model in working with managers, board and input from staff.

On the basis of increased financial duties, merit in excellent work performance, values qualifications incentive, I approve pay increase of \$5000 for salary to apply retro-actively to April 1, 2022.

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Job Title Financial Controller

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Department ADM

Manager Irene Linklater Executive Director

Review Period **2021-2022**

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GOALS*(as agreed upon by employee and manager)*

I am in support of Tara's professional development plans that she chooses to undertake aligned with her management and financial responsibilities.

3 Training Goals expressed in 2021 were hampered by COVID and these can continue in 2022

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 Oct. 28-2022

Manager Signature

Date Oct. 28-2022