

## Policy I.32.B – Operations Manager Performance Evaluation Form

Employee Name:	Start Date:
Today's Date:	Next Review Date:

This performance appraisal will recap major duties, goals, objectives and critical success factors. For each duty indicate rating on the scale in relation to this Position Job Description and provide explanations in the comments section. Where improvement is required, clarifying comments should be provided accompanied with specific goals and establishment of outcome measures within a given time frame in order to enable a subsequent evaluation.

**Rating Scale:**

- 5 exceeding expectations (excellent)
- 4 very high level of competency (very good)
- 3 moderately high level of competency – able to do well in almost all circumstances (good)
- 2 competent – but need to seek/receive assistance relatively often (fair)
- 1 need to gain competency in this area (poor)
- N/A not applicable

<i><b>General Administrative Duties</b></i>			
	Self-rating	Supervisor's Rating	How I demonstrate this:
<ul style="list-style-type: none"> <li>• <b>Word Processing &amp; Data Entry</b> such as emails, broadcast emails, minutes, financial data entry</li> </ul>			
<ul style="list-style-type: none"> <li>• <b>Maintenance of Membership Registry</b> using excel and updating renewals from SAC and mbr changes throughout renewal year</li> </ul>			
<ul style="list-style-type: none"> <li>• <b>Website maintenance:</b> posting/removing items in various locations and providing account set-up and maintenance to members; assisting with private practice listing posts and management of the job posting processes</li> </ul>			
<ul style="list-style-type: none"> <li>• <b>Maintenance of Association Policies and Procedures and Bylaws:</b> Updates document, updates policies as appropriate; updates Gov't records as per Societies Act</li> </ul>			
<ul style="list-style-type: none"> <li>• <b>Record Keeping:</b> Meeting Minutes, Bylaws, Archiving</li> </ul>			
<ul style="list-style-type: none"> <li>• <b>Reception and Direction of Inquiries:</b> respond and/or</li> </ul>			

redirect as necessary			
• <b>Arranging conference call information for Committees</b>			
• <b>Ordering supplies</b>			
<b>Supervisor's Feedback:</b>			
<b>Support/Action Plan:</b>			

<b>Financial Responsibilities:</b>			
	<b>Self-rating</b>	<b>Supervisor's Rating</b>	<b>How I demonstrate this:</b>
• <b>Prepares bank deposits</b>			
• <b>Accounts Receivables</b>			
• <b>Accounts Payable</b>			
• <b>Completes Payroll</b>			
• <b>Prepares and Files T4s and HST Filing</b>			
• <b>Generates reports:</b> Income Statement, General Ledger and Trial Balances			
• <b>Reconciles Bank Accounts Monthly</b>			
• <b>Prepares all documentation and files for Year End Review with Accountant</b>			
• <b>Completes any adjustments</b> required for Year End Closure			
• <b>Advises Treasurer and President of any issues</b> and keeps apprised of situation			
<b>Supervisor's Feedback:</b>			
<b>Support/Action Plan:</b>			

**Provincial Council Responsibilities**

	Self-rating	Supervisor's Rating	How I demonstrate this:
<ul style="list-style-type: none"> <li>Establishes and maintains effective interpersonal relationships. Is a collaborative team player</li> </ul>			
<ul style="list-style-type: none"> <li>Works closely with the President to accomplish Association Objectives and Business: adherence to policies, bylaws; strat planning; new initiatives; AGM planning</li> </ul>			
<ul style="list-style-type: none"> <li>Assists PC members in fulfilling their roles</li> </ul>			
<ul style="list-style-type: none"> <li>Provides information and advice on issues when asked</li> </ul>			
<ul style="list-style-type: none"> <li>Seeks opportunities to efficiently run the Association office and lower costs</li> </ul>			
<ul style="list-style-type: none"> <li>Values and remains open to new ideas and perspectives</li> </ul>			
<b>Supervisor's Feedback:</b>			
<b>Support/Action Plan:</b>			

<b>Speech and Hearing BC Organizational Awareness:</b>			
Supports the vision, strategic direction and purpose of the Centre. Understands how the department/program is an integral part of the larger organization. Supports and encourages family/client involvement within the organization.			
	Self-rating	Supervisor's Rating	How I demonstrate this:
<ul style="list-style-type: none"> <li>Knowledge of Speech and Hearing BC Policies and Procedures &amp; Bylaws</li> </ul>			
<ul style="list-style-type: none"> <li>Knowledge of Governance and Committee Structure</li> </ul>			
<ul style="list-style-type: none"> <li></li> </ul>			
<b>Supervisor's Feedback:</b>			
<b>Support/Action Plan:</b>			

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<b>Conference Responsibilities:</b>			
Assists in the preparation of annual conference and training events.			
• <b>Conference registration and database</b> management			
• <b>Conference program</b>			
• <b>Conference advertising:</b> website, broadcast emails			
• <b>Hotel</b> planning and contract			
• <b>Exhibitor</b> arrangements			
• <b>Delegate package</b> and nametags			
• <b>Speaker</b> arrangements			
• <b>All financial processing:</b> credit card payments, bank deposits, receipts, writing cheques, sponsorship tracking, expense payments			
• Conference Website – updating all content			
<b>Supervisor's Feedback:</b>			
<b>Support/Action Plan:</b>			

<b>Resiliency:</b>			
Effectively copes with change, risk and uncertainty. Is flexible and adaptable. Enjoys the challenge of unfamiliar tasks. Is committed to self-development. Seeks feedback. Learns quickly when faced with new problems.			
	<b>Self-rating</b>	<b>Supervisor's Rating</b>	<b>How I demonstrate this:</b>
• Says 'yes' when asked to try something new			
• Asks others for feedback. Identifies opportunities for self-development			
• Volunteers for new tasks or assignments			
• Offers suggestions for service improvement to decision-makers			

<ul style="list-style-type: none"> <li>Asks the right people for help when faced with difficulties</li> </ul>			
<b>Supervisor's Feedback:</b>			
<b>Support/Action Plan:</b>			

AGM Responsibilities			
<ul style="list-style-type: none"> <li><b>Works with President and Awards Chair on notice to members</b> re AGM and bylaw changes</li> </ul>			
<ul style="list-style-type: none"> <li><b>Sends out Agenda and Minutes</b> to members as per bylaws</li> </ul>			
<ul style="list-style-type: none"> <li><b>Ensures Membership list is current</b> for AGM Meeting and voting</li> </ul>			
<ul style="list-style-type: none"> <li><b>Works with Awards Chair</b> on awards notification, awards dinner agenda, trophies</li> </ul>			
<b>Supervisor's Feedback:</b>			
<b>Support/Action Plan:</b>			

**Organization:** Establishing priorities; meeting deadlines; arranging work schedules; adapting to changes and using time and resources effectively; delegate work; follow-up to ensure work is completed.

Very Poor				Outstanding
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**Comments:**

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**Problem Analysis and Decision Making:** Understanding factors and developing sound, practical and workable solutions. Recognizing when a decision is necessary; asking for input making timely decisions; accepting responsibility; making creative contribution to solution of problems; resolving problems; providing information and feedback in a timely manner; willingness to make necessary and immediate decisions given incomplete information.

Very Poor				Outstanding
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**Comments:**

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**Communication Skills:** Display of oral and/or written communication skills required by the job. Ability to listen and understand information, and present information in a clear and concise manner.

Very Poor				Outstanding
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**Comments:**

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**Human Relations:** Interacts effectively and maintains positive relationships with Association members, and customers. Able to work with others; builds teamwork; motivates and inspires others. Cooperates with persons outside of the Association; willingly accepts assignments given and assists others to accomplish team objectives. Develops confidence and organizes activities to meet goals.

Very Poor				Outstanding
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**Comments:**

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**Initiative and Creativity:** Resourceful to deviate from the routine; self starter; develops and implements new methods, procedures, solutions, concepts, designs and/or applications of existing designs or procedures. Accepts additional challenges and willingly assists others. Self-reliant, demonstrates imagination, originality and self motivation; makes innovative and productive contribution. Responds to changing requirements and meeting changing technical business needs; flexibility and adaptability.

Very Poor			Outstanding
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**Comments:**

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**Quality of Work:** Accuracy, thoroughness, and efficiency of work regardless of volume; ability to meet standards of quality.

Very Poor			Outstanding
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**Comments:**

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**Summary of Strengths:**

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**Developmental Objectives:**

Identify, in collaboration with employees, specific plans for employee development and training for improvement during the coming review period. Please focus on new performance goals/standards for the upcoming performance planning cycle or how an employee can enhance current skills, develop new or improve deficiencies. Developmental objectives may include, but are not limited to, the following areas: training in new technology; enhancing communication skills; participating on a process improvement team; developing and implementing new techniques, tools and processes; attending advanced pc/software training; attending and administrative procedures workshop; attending a human resources development module, etc. (Attach additional page(s) if needed)

1. \_\_\_\_\_

2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_

**SIGNATURES:**

Employee comments (optional - may include discussion of professional development plans and objectives):

\_\_\_\_\_

Speech and Hearing BC Representative: \_\_\_\_\_ Date

Speech and Hearing BC Representative: \_\_\_\_\_ Date

Employee Signature: \_\_\_\_\_ Date

*Your signature does not necessarily mean that you agree with this review; it is only to acknowledge that your supervisor has met and reviewed it with you.*

- Agreement  
 No Agreement