

Form – Finance Manager – Performance Review Template

Step 1: Plan – Reviews to be completed by the end of the first week of October Yearly

1. Plan the review by according to your business goals for the year ahead. Think about how the employee’s work performance will help your business reach these goals. You should consider:
 - what tasks the job involves
 - what skills and abilities are needed to do the job?
 - what level of performance is expected?
2. Book a Review meeting with each employee
3. Email each employee a copy of their position description, and Performance Review for return (with employee comments) before the meeting.

Step 2: Review

1. Meet with each employee every 12 months to assess their performance against the agreed goals.
2. During the meeting, talk with the employee about:
 - how they have been performing
 - the skills they need to develop
 - their own ideas about learning and development opportunities
 - for casual staff - provide a copy of the Fairwork casual statement www.fairwork.gov.au/sites/default/files/migration/724/casual-employment-information-statement.pdf
3. Document any actions required in the comments section with a follow up date.
4. Consider whether you need to revise their performance goals or set new ones for the next cycle.

Good practice four-point rating scale - To be used by Manger for evaluating performance goals

Use this 1-4 rating scale to rate each criteria with comments in the review document.

Four-point rating scale	Definition
1. Does not meet expectations	The employee consistently fails to meet agreed expectations
2. Meets most expectations	The employee meets most agreed expectations
3. Meets all expectations	The employee meets all agreed expectations
4. Exceeds expectations	The employee always meets and sometimes exceeds agreed expectations

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Performance Review and Development Plan

Employee Details			
Employee name:		Position:	
Commencement date:		Department:	
Performance Period			
Annual Review Date:			

Acknowledgement of Review *To be signed off by Employee and Manager after review*

Agreement – Planning & Annual Review					
Employee Name:		Signature		Date:	
Manager Name:		Signature		Date:	

Employee Survey	
Have you reviewed your position description? Please circle and add any comments	Yes/No
Do you have any feedback on the Headway communications (e.g., newsletter, website, internal communications)?	
Are there any areas of training you would like to see across Headway (e.g., staff meetings, training days)?	

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Performance goals *Employee to enter comments, then Manager to enter a rating and comment*

Task / Responsibility	Required outcomes	Annual Review Progress Employee Comments	Annual Review Progress Manager Comments	Rating scale 1-4
Leadership and Team Supervision	1.Oversee the finance team, ensuring effective onboarding and induction of new staff and management of the team. 2.Effective communication with the CEO and management team, providing regular and ad hoc reports as necessary. 3.Ensure employees are supported in their position within the finance team and provided appropriate opportunities for training and development. 4.Ongoing management and supervision of accurate, thorough and efficient administration of finance business unit activities 5.Enhanced understanding of the requirements under regulatory compliance (NDIS, ATO).			
Client Contact	1.Management of escalated, complex or senior level enquiries ensuring staff are supported during difficult enquiries.			

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	<p>2.Ensure accurate files are entered and maintained in all facets of the organisation (CRM and other relevant systems).</p> <p>3.Oversee all payroll, finance activities and professional correspondence in a time-efficient and organised manner, in the timelines committed with high degree of accuracy</p> <p>4.Ensure financial matters are escalated to management as appropriate.</p>			
Financial Management	<p>1.Oversee all areas of the finance department, ensuring accurate processes are in place and enquiries are responded to appropriately.</p> <p>2.Manage the financial budget for the organisation, contributing at the operational and strategic level with the support of the CEO and CFO.</p> <p>3.Produce reports as appropriate, producing and analysing the P & L report on a regular basis.</p> <p>4.Guide the Finance Officer and Assistant to ensure their tasks are completed efficiently and accurately.</p>			

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	<p>5. Identify opportunities for efficiency, improvement or value adding to our payroll and financial administration activities</p> <p>6. Ensure data management across accounting and payroll functions is to the high standard expected</p>			
<p>General Administration</p>	<p>1. Ensure effective administration of all financial tasks.</p> <p>2. Collate accurate, thorough and clear records and details as they relate to our clients, employees, processes and activities</p> <p>3. Demonstrate awareness and understanding of expected financial standards as well as applicable policies and procedures including references to the NDIS, ATO, Fair Work Act, and Headway Gippsland delegations of authority</p> <p>4. Effective administration of CRM, Finance and Payroll system management for all client or employee related data/enquiries</p>			

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Learning / Development / Training Plan Areas to be marked N/A if not required.

Areas for learning/development skills and behaviors the employee could improve	Actions <i>List agreed strategies to achieve the learning/development</i>	Annual Review Progress Employee Comments	Annual Review Progress Manger Comments
Areas for training skills and behaviors the employee could have formal training in	Actions <i>List agreed strategies to achieve the development</i>	Annual Review Progress Employee Comments	Annual Review Progress Manager Comments

Overall comments	
Employee overall comments:	
Manager overall comments:	

Review discussion notes	Date Due
Any other discussion points to be recorded or followed up:	