

MANAGER ANNUAL PERFORMANCE EVALUATION

Name	Branch	Effective Date	
		Rating	Points
• Average Proficiency Points Last Twelve Months (49 and under Unsatisfactory; 50 to 70 Needs Improvement; 71 to 90 Satisfactory; 91+ Excellent)		_____	_____
• Employee Training (Total weekly rating meetings held last 12 months: _____) (0-20 Unsatisfactory; 21-30 Needs Improvement; 31-40 Satisfactory; 41+ Excellent)		_____	_____
• Retention/Growth _____%. (Under 98% Unsatisfactory; 98% to 101% Needs Improvement; 102% to 104% Satisfactory; 105%+ Excellent)		_____	_____
• Asset Audit Ratings (See Individual Scale)		_____	_____
• Office Appearance (See Individual Scale) (Include outside signs, decals, windows, storeroom, and bathroom, all office files and report binders)		_____	_____
• Supervisor, visitation Reports Rate each report, apply individual scale and average		_____	_____
• Expense Budget/Control (% Over Budget) (10%+ Unsatisfactory; +6%-9% Needs Improvement; +1%-5% Satisfactory; 0% or below Excellent)		_____	_____
• Attitude (See Individual Scale) Reports accurately, keeps management properly informed _____; Is receptive to Company policy and follows instructions _____; Has positive attitude _____; Has desire to meet Company goals and standards _____.		_____	_____
• Total Individual Rating Points			_____
• Overall Rating			
Unsatisfactory _____	Needs Improvement _____	Satisfactory _____	Excellent _____

COMMENTS

	Manager Signature		Supervisor Signature	
<u>Rating Scale</u>	1	2	3	4
<u>Individual</u>	Unsatisfactory 0-4	Needs Improvement 5-9	Satisfactory 10-14	Excellent 15
Overall	0-50	51-75	76-100	100+

Attach salary recommendation, and forward to State Vice President of Operations at least twenty (20) days prior to the effective date of any salary adjustment.

Performance Plan		Evaluation Period	
Employee Name		to	
Div./Dept.		City/Subsidiary	Supervisor Name
		Job Title Manager	
List the major accountabilities of the job. An accountability may be a duty, responsibility or assignment. For each accountability, list the significant tasks or activities required to accomplish it. Indicate by priority number the relative importance of each accountability. Then list performance expectations describing the conditions which constitute fully successfully performance of each accountability.			
Accountability #1			Priority #
COLLECTIONS			1
TASKS	<ul style="list-style-type: none"> ▪ Telephone, adjust accounts, skip trace, correspondence, chase, legals. ▪ Organize 		
EXPECTATIONS	<ul style="list-style-type: none"> ▪ Assure all collection work is completed on a daily basis. ▪ Organize all collection work each day prior to leaving branch. ▪ Del: _____ Opening 30's: _____ Increase: _____ Opening increase: _____ 		
Accountability #2			Priority #
PROFIT			2
TASKS	<ul style="list-style-type: none"> ▪ Generate loan volume. ▪ Control bad debt. ▪ Control expenses. ▪ Control insurance claims. ▪ Control APE. ▪ Control hours. 		
EXPECTATIONS	<ul style="list-style-type: none"> ▪ Standard loan volume. ▪ Standard bad debt. ▪ Meet budgeted expenses. ▪ Practice goo underwriting. ▪ Control APE to standard. ▪ Control employee hours to Company standards. 		
Accountability #3			Priority #
PERSONNEL			3
TASKS	<ul style="list-style-type: none"> ▪ Train. ▪ Develop. ▪ Retain. ▪ Recruit. 		
EXPECTATIONS	<ul style="list-style-type: none"> ▪ Train each employee to meet daily basic job routine. ▪ Develop assistant managers to be qualified to manage, develop all personnel to be very proficient at all duties. ▪ Retain employees by developing, training, and showing personal interest in each employee. ▪ Recruit experienced finance personnel as managers or overstaff. 		

Performance Plan (cont'd)		Employee Name:
Accountability #4		Priority #
CUSTOMER SERVICE/PUBLIC RELATIONS		4
TASKS	<ul style="list-style-type: none"> ▪ Customer relations. ▪ Know competition – Magistrates – business managers. ▪ Character 	
EXPECTATIONS	<ul style="list-style-type: none"> ▪ Treat customers with respect and dignity. Provide good, fast, courteous service. ▪ Personally meet all competitors and Magistrates. Establish a relationship of communication and helpfulness. ▪ Maintain a good character and community standing. 	
Accountability #5		Priority #
BUSINESS DEVELOPMENT		5
TASKS	<ul style="list-style-type: none"> ▪ Growth in customers. ▪ Inner growth in receivables. 	
EXPECTATIONS	<ul style="list-style-type: none"> ▪ Retaining 98% of open accounts Jan. 1 to Sept. 30 – Meet Company’s goals and projections for customer growth. ▪ Reach Company goal for average unpaid balance – make the maximum size loan customer qualifies for. 	
Accountability #6		Priority #
ASSET CONTROL		6
TASKS	<ul style="list-style-type: none"> ▪ Credit extension ▪ Receivables, cash ▪ Furniture and fixtures ▪ Supplies ▪ Records and reports 	
EXPECTATIONS	<ul style="list-style-type: none"> ▪ Extend credit per Company policy. ▪ Maintain receivables and cash in balance – protect Company assets. ▪ Promote and supervisor proper care of furniture and fixtures. ▪ Maintain supplies neat and orderly – meet budgeted cost for office supplies monthly. ▪ Complete and maintain all records neat and accurate – submit on time. 	
CERTIFICATION: We have prepared this plan together.		
_____ Employee Signature	_____ Date	Projected Date of Intermediate Review _____
_____ Manager/Supervisor Signature	_____ Date	
_____ Reviewed By	_____ Date	
<i>Use additional sheets as needed to update this plan.</i>		

Performance Evaluation		Date of Annual Evaluation		
			TO	
Employee Name		Job Title Manager		
Div./Dept		City/Subsidiary		
For each accountability listed on the Performance plan, describe the employee's actual performance compared to expectations. Summarize the employee's performance, indicating strengths as well as areas that need improvement. Place a check in the box beside the performance level the employee has achieved on that accountability. Make sure the number of the accountability you are rating corresponds to the number of that accountability on the Performance Plan.				
ACCT.	ACTUAL PERFORMANCE COMPARED TO EXPECTATIONS		PERFORMANCE LEVEL	
# 1			<input type="checkbox"/> Does not meet <input type="checkbox"/> Basically meets <input type="checkbox"/> Fully meets <input type="checkbox"/> Exceeds <input type="checkbox"/> Far exceeds	
# 2			<input type="checkbox"/> Does not meet <input type="checkbox"/> Basically meets <input type="checkbox"/> Fully meets <input type="checkbox"/> Exceeds <input type="checkbox"/> Far exceeds	
# 3			<input type="checkbox"/> Does not meet <input type="checkbox"/> Basically meets <input type="checkbox"/> Fully meets <input type="checkbox"/> Exceeds <input type="checkbox"/> Far exceeds	
# 4			<input type="checkbox"/> Does not meet <input type="checkbox"/> Basically meets <input type="checkbox"/> Fully meets <input type="checkbox"/> Exceeds <input type="checkbox"/> Far exceeds	
# 5			<input type="checkbox"/> Does not meet <input type="checkbox"/> Basically meets <input type="checkbox"/> Fully meets <input type="checkbox"/> Exceeds <input type="checkbox"/> Far exceeds	
# 6			<input type="checkbox"/> Does not meet <input type="checkbox"/> Basically meets <input type="checkbox"/> Fully meets <input type="checkbox"/> Exceeds <input type="checkbox"/> Far exceeds	

OTHER FACTORS: Describe any other factors not reflected in the Performance Plan which have had a significant effect on the employee's overall job performance (e.g., special projects or assignments, relationships with others, etc).

OVERALL RATING. Assign an overall rating based on accountability ratings and other significant performance factors. The overall rating should reflect performance levels achieved on the most important accountabilities of the job. If the overall rating differs from individual accountability ratings, please explain in the "Comments" section.

- DOES NOT MEET EXPECTATIONS. Performance is consistently below expectations in most areas. Considerable improvement is necessary.
- BASICALLY MEETS EXPECTATIONS. Performance meets expectations in most areas, but occasionally falls below in some areas. Improvement is desirable.
- FULLY MEETS EXPECTATIONS. Performance fully meets the expectations of the job; may exceed expectations in some areas. Improvement is not necessary, but effectiveness may be enhanced by refinement or more complex applications of knowledge, skills and abilities.
- EXCEEDS EXPECTATIONS. Performance frequently exceeds expectations in many areas. Improvement is not necessary, but effectiveness may be enhanced by refinement or more complex applications of knowledge, skills or abilities.
- FAR EXCEEDS EXPECTATIONS. Performance clearly and consistently exceeds expectations in most areas. Improvement is not necessary, but effectiveness may be enhanced by refinement or more complex applications of knowledge, skills or abilities.

COMMENTS (Optional) The employee and/or manager may use this space to record any pertinent information about the employee's performance that is not reflected elsewhere on the form

EMPLOYEE

MANAGER

CERTIFICATION: I have seen this evaluation and discussed the content with my manager.

_____	Date	Date of Intermediate Review
Employee Signature		
_____	Date	_____
Manager/Supervisor Signature		
_____	Date	
Reviewed by		

Use additional sheets as needed to update this plan