

# WATERLOO | CO-OPERATIVE EDUCATION

## Student Performance Evaluation

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Student Name Angela Ka-Wai Mak

Organization PricewaterhouseCoopers

Student ID Number 20430838

Student Job Title Tax Compliance Intern

Term  Winter (Jan-Apr)  Spring (May-Aug)  Fall (Sept – Dec) Year: 2014

### Supervisor's Guidelines for Completion

#### MID-TERM REVIEW (Informal)

Please conduct a mid-term review with your student to assist in their progress during the work term. Using this form as a guideline, the mid-point discussion is an opportunity for the supervisor and student to discuss topics such as:

- Progress towards overall expectations and goals
- Student's work performance so far
- Training or mentoring resources required for remainder of work term

#### END OF TERM EVALUATION (Required)

The end-of-term performance evaluation allows the supervisor and student to fulfill the evaluation process.

The return of this completed evaluation form is required for the student to receive credit for the work term.

Please fill out this form near the end of the student's work term.

### Guidance on the Rating Scale

**Performance Expectations** -these scales measure the behaviours and abilities that all co-op students are expected to progressively attain and refine as they advance through their years of study

**Developing Performance (1-2)**  
 Students performing within this range require further development and support to meet the performance expectations with respect to output, quality standards, delivery of goals and/or assignments.

**Good Performance (3-5)**  
 Students performing within this range are meeting and, in some instances, exceeding the performance expectations in respect to output, quality standards, and delivery of goals and/or assignments.

**Superior Performance (6-7)**  
 Students performing within this range are consistently exceeding the performance expectations and they should be demonstrating the ability to take on broader responsibilities that would normally be reserved for a staff member working in a regular/permanent role (non-coop).

Problem Solving. Ability to analyze problems or procedures, evaluate alternatives, and select best course of action.						
1	2	3	4	5	6	7
<i>Developing Performance</i>		<i>Good Performance</i>			<i>Superior Performance</i>	
<ul style="list-style-type: none"> <li>• Can make routine decisions but needs ongoing guidance and checking</li> </ul>		<ul style="list-style-type: none"> <li>• Can handle up to make good decisions, requires limited guidance</li> </ul>		<ul style="list-style-type: none"> <li>• Able to manage complex decisions for work without guidance</li> </ul>		Not observed

**EXAMPLE**

<b>1. Interest in Work.</b> The degree to which the student pursues goals with commitment and takes pride in accomplishments.						
<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	<input checked="" type="radio"/> 6	<input type="radio"/> 7
<i>Developing Performance</i>		<i>Good Performance</i>			<i>Superior Performance</i>	
<ul style="list-style-type: none"> <li>Shows little enthusiasm for assigned work, infrequently requests additional tasks</li> </ul>		<ul style="list-style-type: none"> <li>Enthusiastic about their assignments/work, agreeable to new responsibilities, asks for new tasks</li> </ul>			<ul style="list-style-type: none"> <li>Displays enthusiasm for work that is beyond their job requirements; proactively seeks new tasks and responsibilities</li> </ul>	

<b>2. Ability to Learn.</b> The extent to which the student becomes proficient with job duties and work processes.						
<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	<input checked="" type="radio"/> 6	<input type="radio"/> 7
<i>Developing Performance</i>		<i>Good Performance</i>			<i>Superior Performance</i>	
<ul style="list-style-type: none"> <li>Sometimes slow to become proficient at new tasks or work processes</li> </ul>		<ul style="list-style-type: none"> <li>Quick to become proficient at new tasks</li> </ul>			<ul style="list-style-type: none"> <li>Exceeds expectations in the complexity and difficulty of work they are able to successfully complete</li> </ul>	

<b>3. Quality of Work.</b> The ability of the student to set high standards for own personal performance; strive for quality work; put forth extra effort to ensure quality work.						
<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input checked="" type="radio"/> 5	<input type="radio"/> 6	<input type="radio"/> 7
<i>Developing Performance</i>		<i>Good Performance</i>			<i>Superior Performance</i>	
<ul style="list-style-type: none"> <li>Work does not meet expectations, has more than the expected number of errors</li> </ul>		<ul style="list-style-type: none"> <li>Work is usually very thorough and well done, few errors</li> </ul>			<ul style="list-style-type: none"> <li>Work is always very thorough and of excellent quality, few if any errors</li> </ul>	

<b>4. Quantity of Work.</b> The volume of work produced by the student, along with his or her speed and consistency of output.						
<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input checked="" type="radio"/> 5	<input type="radio"/> 6	<input type="radio"/> 7
<i>Developing Performance</i>		<i>Good Performance</i>			<i>Superior Performance</i>	
<ul style="list-style-type: none"> <li>Does not always complete work within time limits</li> </ul>		<ul style="list-style-type: none"> <li>Completes the majority of work within specified deadlines</li> </ul>			<ul style="list-style-type: none"> <li>Consistently completes work ahead of schedule; seeks additional tasks</li> </ul>	

<b>5. Problem Solving.</b> The student's demonstrated ability to analyze problems or procedures, evaluate alternatives, and select the best course of action.						
<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input checked="" type="radio"/> 5	<input type="radio"/> 6	<input type="radio"/> 7
<i>Developing Performance</i>		<i>Good Performance</i>			<i>Superior Performance</i>	
<ul style="list-style-type: none"> <li>Can make routine decisions but needs guidance and checking</li> </ul>		<ul style="list-style-type: none"> <li>Can be relied upon to make good decisions, requires limited guidance</li> </ul>			<ul style="list-style-type: none"> <li>Independently manages complex tasks and makes good decisions for work without guidance</li> </ul>	

<b>6. Teamwork.</b> The degree to which the student works well in a team setting.						
<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input checked="" type="radio"/> 5	<input type="radio"/> 6	<input type="radio"/> 7
<i>Developing Performance</i>		<i>Good Performance</i>			<i>Superior Performance</i>	
<ul style="list-style-type: none"> <li>Sometimes uncooperative; or experiences difficulty relating to others</li> </ul>		<ul style="list-style-type: none"> <li>Frequently cooperative, good team worker</li> </ul>			<ul style="list-style-type: none"> <li>Consistently cooperative, proactively seeks to improve working relationships</li> </ul>	

<b>7. Dependability.</b> The manner in which the student conducts his or herself in the working environment.						
<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	<input checked="" type="radio"/> 6	<input type="radio"/> 7
<i>Developing Performance</i>		<i>Good Performance</i>			<i>Superior Performance</i>	
<ul style="list-style-type: none"> <li>• Displays an inconsistent work ethic and does not always report to work on time or has some attendance issues</li> </ul>		<ul style="list-style-type: none"> <li>• Displays a strong work ethic and is present at work and meetings in a reliable and timely manner</li> </ul>			<ul style="list-style-type: none"> <li>• Displays an excellent work ethic and volunteers to adapt personal schedule to meet work demands</li> </ul>	

<b>8. Response to Supervision.</b> The manner in which the student responds to direction and constructive criticism.						
<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input checked="" type="radio"/> 5	<input type="radio"/> 6	<input type="radio"/> 7
<i>Developing Performance</i>		<i>Good Performance</i>			<i>Superior Performance</i>	
<ul style="list-style-type: none"> <li>• Sometimes disregards direction and feedback from supervisor</li> </ul>		<ul style="list-style-type: none"> <li>• Integrates feedback from supervisor into their work to improve productivity &amp; efficiency</li> </ul>			<ul style="list-style-type: none"> <li>• Takes the initiative to follow through on all feedback from supervisor and to continuously improve upon their daily tasks and approach to work</li> </ul>	

<b>9. Reflection.</b> The student's demonstrated ability to learn and adapt from previous experience.						
<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input checked="" type="radio"/> 5	<input type="radio"/> 6	<input type="radio"/> 7
<i>Developing Performance</i>		<i>Good Performance</i>			<i>Superior Performance</i>	
<ul style="list-style-type: none"> <li>• Has to be told many times before they modify their behaviour or approach to new work based on errors in previous performance.</li> </ul>		<ul style="list-style-type: none"> <li>• Occasionally needs reminder to modify their behaviour or approach to new work based on errors in previous performance</li> </ul>			<ul style="list-style-type: none"> <li>• Independently recognizes the errors in previous performance and proactively modifies their behaviour and approach to new work</li> </ul>	

<b>10. Resourcefulness.</b> The student's demonstrated ability to develop innovative solutions and display flexibility in unique or demanding circumstances.						
<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input checked="" type="radio"/> 5	<input type="radio"/> 6	<input type="radio"/> 7
<i>Developing Performance</i>		<i>Good Performance</i>			<i>Superior Performance</i>	
<ul style="list-style-type: none"> <li>• Unsure how to approach new or stressful situations; has difficulty adjusting to changing priorities and circumstances</li> </ul>		<ul style="list-style-type: none"> <li>• Responds appropriately to new or stressful situations; can adjust to changing priorities and circumstances with guidance</li> </ul>			<ul style="list-style-type: none"> <li>• Generates effective resolutions to new or stressful situations; readily adjusts to changing priorities and circumstances</li> </ul>	

<b>11. Ethical Behaviour.</b> The extent to which the student's behaviour demonstrates integrity and ethics in work and relationships.						
<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	<input checked="" type="radio"/> 6	<input type="radio"/> 7
<i>Developing Performance</i>		<i>Good Performance</i>			<i>Superior Performance</i>	
<ul style="list-style-type: none"> <li>• Needs guidance in making appropriate choices to avoid questionable conduct and/or a conflict of personal and professional interests</li> </ul>		<ul style="list-style-type: none"> <li>• Is able to make the appropriate choices to avoid questionable conduct and/or a conflict of personal and professional interests</li> </ul>			<ul style="list-style-type: none"> <li>• Proactively identifies potential conflicts of interest or questionable conduct and acts to avoid or mitigate these issues</li> </ul>	

<b>12. Appreciation of Diversity.</b> The degree to which the student shows understanding and sensitivity to needs and differences of others (i.e. ethnicity, religion, language, etc.)						
<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input checked="" type="radio"/> 5	<input type="radio"/> 6	<input type="radio"/> 7
<i>Developing Performance</i>		<i>Good Performance</i>			<i>Superior Performance</i>	
<ul style="list-style-type: none"> <li>Has difficulty interacting with others due to individual differences</li> </ul>		<ul style="list-style-type: none"> <li>Has positive interactions with others and is respectful of individual differences</li> </ul>			<ul style="list-style-type: none"> <li>Demonstrates leadership in promoting positive interactions and encouraging others to work together despite individual differences</li> </ul>	

<b>13. Entrepreneurial Orientation.</b> The students demonstrated ability to take informed risks that demonstrate creativity and add value to the company.						
<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input checked="" type="radio"/> 5	<input type="radio"/> 6	<input type="radio"/> 7
<i>Developing Performance</i>		<i>Good Performance</i>			<i>Superior Performance</i>	
<ul style="list-style-type: none"> <li>Has difficulty evaluating alternative ideas and making choices that enhance the department or organization</li> </ul>		<ul style="list-style-type: none"> <li>Able to evaluate alternative ideas and will sometimes make choices that enhance the department or organization</li> </ul>			<ul style="list-style-type: none"> <li>Able to effectively evaluate alternative ideas and independently makes choices that enhance the department or organization</li> </ul>	

<b>14. Written Communication.</b> The extent to which the student demonstrates effective written communication.						
<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input checked="" type="radio"/> 5	<input type="radio"/> 6	<input type="radio"/> 7
<i>Developing Performance</i>		<i>Good Performance</i>			<i>Superior Performance</i>	
<ul style="list-style-type: none"> <li>Not consistently clear and concise or requires frequent checking and editing</li> </ul>		<ul style="list-style-type: none"> <li>Normally clear, well organized and understandable and needs only moderate checking and editing</li> </ul>			<ul style="list-style-type: none"> <li>Always clear, well organized and easily understandable; rarely requires checking and editing</li> </ul>	

<b>15. Oral Communication.</b> The extent to which the student demonstrates effective oral communication.						
<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input checked="" type="radio"/> 5	<input type="radio"/> 6	<input type="radio"/> 7
<i>Developing Performance</i>		<i>Good Performance</i>			<i>Superior Performance</i>	
<ul style="list-style-type: none"> <li>Occasionally encounters difficulty with expressing ideas clearly and persuasively; demonstrates discomfort with public speaking</li> </ul>		<ul style="list-style-type: none"> <li>Normally clear, well organized, understandable, and persuasive, good public speaker</li> </ul>			<ul style="list-style-type: none"> <li>Always clear, well organized, easily understandable, and exceptionally persuasive, excellent public speaker</li> </ul>	

<b>16. Interpersonal Communication.</b> The extent to which the student effectively listens, conveys, and receives ideas, information, and direction.						
<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input checked="" type="radio"/> 5	<input type="radio"/> 6	<input type="radio"/> 7
<i>Developing Performance</i>		<i>Good Performance</i>			<i>Superior Performance</i>	
<ul style="list-style-type: none"> <li>Displays inconsistent listening skills and is reluctant to seek input from others.</li> </ul>		<ul style="list-style-type: none"> <li>Interactions with others demonstrate acceptable listening skills and the ability to sometimes seek the opinions, ideas, and expertise of others.</li> </ul>			<ul style="list-style-type: none"> <li>Interactions with others demonstrate exceptional active listening skills and the ability to proactively seek the opinions, ideas, and expertise of others.</li> </ul>	

<b>Overall Performance Rating</b>	
<b>Outstanding Performance</b>	<input type="radio"/>
<ul style="list-style-type: none"> <li>The student has significantly exceeded all behavioural and developmental performance expectations in respect to output, quality standards, delivery of goals and assignments.</li> <li>This rating is <b>reserved for only those few students</b> who have distinguished themselves by their unique contribution or exceptional performance</li> </ul>	
<b>Your written comments are required below in order to register the rating of Outstanding</b> <div style="border: 1px solid black; height: 100px; width: 100%;"></div>	
<b>Excellent Performance</b>	<input checked="" type="radio"/>
<ul style="list-style-type: none"> <li>The student has exceeded all performance expectations in respect to output, quality standards, delivery of goals and assignments.</li> <li>Receiving this rating means the manager is delighted with this student's performance.</li> </ul>	
<b>Very Good Performance</b>	<input type="radio"/>
<ul style="list-style-type: none"> <li>The student has met all and exceeded some performance expectations in respect to output, quality standards, delivery of goals and assignments.</li> <li>Receiving this rating means the manager is very pleased with this student's performance.</li> </ul>	
<b>Good Performance</b>	<input type="radio"/>
<ul style="list-style-type: none"> <li>The student meets performance expectations in respect to output, quality standards, delivery of goals and assignments.</li> <li>Receiving this rating means the manager is pleased with this student's performance.</li> </ul>	
<b>Satisfactory Performance</b>	<input type="radio"/>
<ul style="list-style-type: none"> <li>The student has not fully met the performance expectations in respect to output, quality standards, delivery of goals and assignments</li> <li>Receiving this rating means the manager is mostly satisfied with the student's performance</li> </ul>	
<b>Marginal Performance</b>	<input type="radio"/>
<ul style="list-style-type: none"> <li>Overall performance requires improvement and/or certain key aspects of performance require improvement while other aspects may be satisfactory</li> <li>Receiving this rating means the manager is displeased with this student's performance</li> </ul>	
<b>Unsatisfactory Performance</b>	<input type="radio"/>
<ul style="list-style-type: none"> <li>The student did not meet performance requirements.</li> </ul>	

<b>Supervisor's Comments - Please comment on the student's overall job performance:</b>
Angela has been very helpful during the internship and delivered work in a neat and organised manner. She demonstrated good understanding to her work (even for some complicated tax cases) as well as computer soft skills and sought guidance proactively. I'm happy to work with Angela.

**Student's Comments - Please comment on your overall performance including your ability to achieve learning objectives and your future employment expectations:**

This employment at PwC has opened my eyes to the taxation field of business and my supervisor allowed me take part in each step of the way to experience the entire process from beginning to end. I did indeed feel lost at some points due to my lack of technical knowledge and I will strive to be more prepared in future work terms. I truly believe that this work term has been the most enriching that I've had so far.

**Supervisor's Recommendations- Please provide your recommendations for the student's personal and/or professional development (optional):**

- Enhance tax technical knowledge (if you find interest in this field)
- Seek feedback from coach after assignment

\* Did you review the completed evaluation form with the student? (Please ensure the student has a copy)

Yes  No

**Next Work Term**

Do you wish to have the student return for the next work term?

Yes  No  Not Applicable

If yes, have you offered to re-employ the student for the next work term?

Yes  No  To be determined

If yes, was your offer: Accepted  Declined

If the student, has accepted please confirm:

Work term Dates: From: \_\_\_\_\_ To: \_\_\_\_\_ To be determined

Co-operative Education will contact you to confirm new job details.

*Wong Ho Ting* *Wong Ho Ting* Senior Consultant 22 Aug 2014  
Supervisor's Name (Please Print) Signature Title Date

*Angie Ma* 22/08/2014  
Student's Signature Date

Manager/Human Resources Signature (optional) Title Date