

WATERLOO | CO-OPERATIVE EDUCATION

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Student Performance Evaluation

Student Name Angela Mak Organization Citco (Canada) Inc
Student ID Number 20430838 Student Job Title Investor Relations

Term ☒ Winter (Jan-Apr) ☐ Spring (May-Aug) ☐ Fall (Sept – Dec) Year: 2015

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	Not observed
Developing Performance		Good Performance			Superior Performance		
• Can make routine decisions but needs ongoing guidance and checking		• Can make good decisions, requires limited guidance			• Able to manage complex decisions for work without guidance		

1. Interest in Work. <i>The degree to which the student pursues goals with commitment and takes pride in accomplishments.</i>				
<input type="radio"/> 1 <input type="radio"/> 2	<input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5	<input type="radio"/> 6 <input checked="" type="radio"/> 7	<input type="radio"/> Not observed	
<i>Developing Performance</i> <ul style="list-style-type: none"> Shows little enthusiasm for assigned work, infrequently requests additional tasks 	<i>Good Performance</i> <ul style="list-style-type: none"> Enthusiastic about their assignments/work, agreeable to new responsibilities, asks for new tasks 	<i>Superior Performance</i> <ul style="list-style-type: none"> Displays enthusiasm for work that is beyond their job requirements; proactively seeks new tasks and responsibilities 		

2. Ability to Learn. <i>The extent to which the student becomes proficient with job duties and work processes.</i>				
<input type="radio"/> 1 <input type="radio"/> 2	<input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5	<input type="radio"/> 6 <input checked="" type="radio"/> 7	<input type="radio"/> Not observed	
<i>Developing Performance</i> <ul style="list-style-type: none"> Sometimes slow to become proficient at new tasks or work processes 	<i>Good Performance</i> <ul style="list-style-type: none"> Quick to become proficient at new tasks 	<i>Superior Performance</i> <ul style="list-style-type: none"> Exceeds expectations in the complexity and difficulty of work they are able to successfully complete 		

3. Quality of Work. <i>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.</i>				
<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	<input type="radio"/> Not observed	
<i>Developing Performance</i> <ul style="list-style-type: none"> Work does not meet expectations, has more than the expected number of errors 	<i>Good Performance</i> <ul style="list-style-type: none"> Work is usually very thorough and well done, few errors 	<i>Superior Performance</i> <ul style="list-style-type: none"> Work is always very thorough and of excellent quality, few if any errors 		

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

5. Problem Solving. <i>The student's demonstrated ability to analyze problems or procedures, evaluate alternatives, and select the best course of action.</i>				
<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	<input type="radio"/> Not observed	
<i>Developing Performance</i> <ul style="list-style-type: none"> Can make routine decisions but needs guidance and checking 	<i>Good Performance</i> <ul style="list-style-type: none"> Can be relied upon to make good decisions, requires limited guidance 	<i>Superior Performance</i> <ul style="list-style-type: none"> Independently manages complex tasks and makes good decisions for work without guidance 		

6. Teamwork. <i>The degree to which the student works well in a team setting.</i>				
<input type="radio"/> 1 <input type="radio"/> 2	<input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5	<input type="radio"/> 6 <input checked="" type="radio"/> 7	<input type="radio"/> Not observed	
<i>Developing Performance</i> <ul style="list-style-type: none"> Sometimes uncooperative; or experiences difficulty relating to others 	<i>Good Performance</i> <ul style="list-style-type: none"> Frequently cooperative, good team worker 	<i>Superior Performance</i> <ul style="list-style-type: none"> Consistently cooperative, proactively seeks to improve working relationships 		

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

8. Response to Supervision. <i>The manner in which the student responds to direction and constructive criticism.</i>				
<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
Developing Performance <ul style="list-style-type: none"> Sometimes disregards direction and feedback from supervisor 		Good Performance <ul style="list-style-type: none"> Integrates feedback from supervisor into their work to improve productivity & efficiency 		<input checked="" type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> Not observed

9. Reflection. <i>The student's demonstrated ability to learn and adapt from previous experience.</i>				
<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
Developing Performance <ul style="list-style-type: none"> Has to be told many times before they modify their behaviour or approach to new work based on errors in previous performance. 		Good Performance <ul style="list-style-type: none"> Occasionally needs reminder to modify their behaviour or approach to new work based on errors in previous performance 		<input checked="" type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> Not observed

10. Resourcefulness. <i>The student's demonstrated ability to develop innovative solutions and display flexibility in unique or demanding circumstances.</i>				
<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
Developing Performance <ul style="list-style-type: none"> Unsure how to approach new or stressful situations; has difficulty adjusting to changing priorities and circumstances 		Good Performance <ul style="list-style-type: none"> Responds appropriately to new or stressful situations; can adjust to changing priorities and circumstances with guidance 		<input checked="" type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> Not observed

11. Ethical Behaviour. <i>The extent to which the students behaviour demonstrates integrity and ethics in work and relationships.</i>				
<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
Developing Performance <ul style="list-style-type: none"> Needs guidance in making appropriate choices to avoid questionable conduct and/or a conflict of personal and professional interests 		Good Performance <ul style="list-style-type: none"> Is able to make the appropriate choices to avoid questionable conduct and/or a conflict of personal and professional interests 		<input checked="" type="radio"/> 6 <input type="radio"/> 7 <input type="radio"/> Not observed

12. Appreciation of Diversity. 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 type="radio"/> 5	<input checked="" type="radio"/> 6 <input type="radio"/> 7	<input type="radio"/> Not observed	
<p><i>Developing Performance</i></p> <ul style="list-style-type: none">• Has difficulty interacting with others due to individual differences	<p><i>Good Performance</i></p> <ul style="list-style-type: none">• Has positive interactions with others and is respectful of individual differences	<p><i>Superior Performance</i></p> <ul style="list-style-type: none">• Demonstrates leadership in promoting positive interactions and encouraging others to work together despite individual differences		

13. Entrepreneurial Orientation. <i>The students demonstrated ability to take informed risks that demonstrate creativity and add value to the company.</i>				
<input type="radio"/> 1 <input type="radio"/> 2	<input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5	<input type="radio"/> 6 <input type="radio"/> 7	<input checked="" type="radio"/> Not observed	
<i>Developing Performance</i> <ul style="list-style-type: none">• Has difficulty evaluating alternative ideas and making choices that enhance the department or organization	<i>Good Performance</i> <ul style="list-style-type: none">• Able to evaluate alternative ideas and will sometimes make choices that that enhance the department or organization	<i>Superior Performance</i> <ul style="list-style-type: none">• Able to effectively evaluate alternative ideas and independently makes choices that enhance the department or organization		

14. Written Communication. 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 type="radio"/> 5	<input checked="" type="radio"/> 6	<input type="radio"/> 7	<input type="radio"/> Not observed
Developing Performance		Good Performance			Superior Performance		
<ul style="list-style-type: none">Not consistently clear and concise or requires frequent checking and editing		<ul style="list-style-type: none">Normally clear, well organized and understandable and needs only moderate checking and editing			<ul style="list-style-type: none">Always clear, well organized and easily understandable; rarely requires checking and editing		

15. Oral Communication. 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 type="radio"/> 5	<input checked="" type="radio"/> 6 <input type="radio"/> 7	<input type="radio"/> Not observed	
<p><i>Developing Performance</i></p> <ul style="list-style-type: none">Occasionally encounters difficulty with expressing ideas clearly and persuasively; demonstrates discomfort with public speaking	<p><i>Good Performance</i></p> <ul style="list-style-type: none">Normally clear, well organized, understandable, and persuasive, good public speaker	<p><i>Superior Performance</i></p> <ul style="list-style-type: none">Always clear, well organized, easily understandable, and exceptionally persuasive, excellent public speaker		

16. Interpersonal Communication. <i>The extent to which the student effectively listens, conveys, and receives ideas, information, and direction.</i>				
<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	<input type="radio"/> Not observed	
<i>Developing Performance</i> <ul style="list-style-type: none">• Displays inconsistent listening skills and is reluctant to seek input from others.	<i>Good Performance</i> <ul style="list-style-type: none">• Interactions with others demonstrate acceptable listening skills and the ability to sometimes seek the opinions, ideas, and expertise of others.	<i>Superior Performance</i> <ul style="list-style-type: none">• Interactions with others demonstrate exceptional active listening skills and the ability to proactively seek the opinions, ideas, and expertise of others.		

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

to do
With the help of my teammates and manager, I was able to learn my daily tasks very quickly. This position in the Admin Team has allowed me to take part in many different projects and work with many different teams. As my responsibilities grow, I learned more and more about company procedures and how many different systems work (ex. Axi, ECM). I am looking forward to taking on more challenging projects and responsibilities in my second term, as well as becoming closer with my team members. I enjoyed my time at Citco and I am looking forward to another excellent term ahead!

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

Angela has shown great professionalism, work ethic and dedication.
Keep up the good work, we are happy to keep you one more term.

*** 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: 05/06/15 To: 08/28/15 To be determined ☐

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

Deya Arraez

Supervisor's Name (Please Print)

Deya Arraez

Signature

Manager 05/05/15

Title

Date

Student's Signature

Date

Gareth Ringrose

SVP 05/05/15

Manager/Human Resources Signature (optional)

Title

Date

Overall Performance Rating	
Outstanding Performance <ul style="list-style-type: none"> The student has significantly exceeded all behavioural and developmental performance expectations in respect to output, quality standards, delivery of goals and assignments. This rating is reserved for only those few students who have distinguished themselves by their unique contribution or exceptional performance <p>Your written comments are required below in order to register the rating of Outstanding</p> <div style="border: 1px solid black; height: 150px; width: 100%;"></div>	○
Excellent Performance <ul style="list-style-type: none"> The student has exceeded all performance expectations in respect to output, quality standards, delivery of goals and assignments. Receiving this rating means the manager is delighted with this student's performance. 	⊙
Very Good Performance <ul style="list-style-type: none"> The student has met all and exceeded some performance expectations in respect to output, quality standards, delivery of goals and assignments. Receiving this rating means the manager is very pleased with this student's performance. 	○
Good Performance <ul style="list-style-type: none"> The student meets performance expectations in respect to output, quality standards, delivery of goals and assignments. Receiving this rating means the manager is pleased with this student's performance. 	○
Satisfactory Performance <ul style="list-style-type: none"> The student has not fully met the performance expectations in respect to output, quality standards, delivery of goals and assignments Receiving this rating means the manager is mostly satisfied with the student's performance 	○
Marginal Performance <ul style="list-style-type: none"> Overall performance requires improvement and/or certain key aspects of performance require improvement while other aspects may be satisfactory Receiving this rating means the manager is displeased with this student's performance 	○
Unsatisfactory Performance <ul style="list-style-type: none"> The student did not meet performance requirements. 	○

<p>Supervisor's Comments - Please comment on the student's overall job performance:</p> <div style="border: 1px solid black; padding: 10px; min-height: 150px;"> <p>As mentioned in the midterm review Angela needed little training to understand our systems, AXI and ECM, and was able to immediately start first on our daily duties and soon handling projects. She was able to do follow ups with the Teams on outstanding items; running reports and doing Data verifications and input in our TA system. She became very familiar with our procedures by handling all type of projects. She has been working with great dedication, accuracy and motivation, always ready to take on more responsibilities, showing a great Team spirit. Needless to say that we are happy to have Angela for a second Term with us.</p> </div>
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