***-----2024 Annual Review -----***

**A. Job Description Review**

**Employee Answer**:

Current job description accurately reflects the role requirements.

Current job description needs updating.

**Supervisor Answer:**

Current job description needs updating. Please find revised version attached.

Current job description needs updating. Supervisor will submit to HR before Click or tap to enter a date.

**Beyond Bank: One family empowering the underserved in a God-honoring and profitable way.**

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| 2024 Strategic Objectives | Definitions | Key Results |
| 1. Deepen Client Engagement | We will build lasting relationships with our clients that foster transformation. | * 5pt improvement on each 2024 Client Satisfaction survey vs. 2023 |
| 1. Grow Profitably | We will scale and be profitable while remaining mission true. | * Annual Operating Profit for 2024 |
| 1. Expand Frontiers | “Beyond Bank” – we will use technology to expand outreach beyond branches and reduce operating costs. | * > 70% of transactions through digital channels by 31-Dec-2024 * Opex ratio < 36% for 2024 |

To achieve our strategic plan, we will focus on the following supporting objectives:

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| **People** | Equipped staff who love their work. |
| **Products** | Responsive and profitable products delivered with distinguished service. |
| **Technology** | Trustworthy, people-first technology that simplifies work and meets client needs. |
| **Partnerships** | Leverage the strengths of others to benefit our clients and achieve our goals. |

**B. Position-Specific Objectives** Complete the chart below with the Key Performance Indicator (KPI) goals for your position. Leave any extra KPI lines blank. Note: please use only the first 4 columns during annual goal setting. The 3 grey columns to the right will *only* be completed during the midterm and annual review with actual performance results at the time of review.

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| **How often did your supervisor meet with you to discuss these objectives?** Employee click to enter text. |

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| -----------------------------Complete during goal setting----------------------------- | | | | --------Complete during review only-------- | | | |
| Key Performance Indicator (KPI)  *(examples)* | From (current)  31-Jan-24 | To (target) by  30-Jun-24 | To (target) by  31-Dec-24 | | Results as of  30-Jun-24  31-Dec-24 | Self-Eval Score  (1-5) (a) | Supervisor  Score  (1-5) (a) | |
| Gross Portfolio |  |  |  | |  |  |  | |
| No. of groups |  |  |  | |  |  |  | |
| No. of new groups |  |  |  | |  |  |  | |
| No. of new clients graduated to MBL |  |  |  | |  |  |  | |
| MHose usage |  |  |  | |  |  |  | |
| PAR30 |  |  |  | |  |  |  | |
| PAR90 |  |  |  | |  |  |  | |
| Write-offs |  |  |  | |  |  |  | |
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1. 5—Exceptional, 4—Exceeds Expectations, 3—Meets Expectations, 2—Needs Improvement, 1—Unsatisfactory

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| **Comments on position-specific objectives:** *(optional)* | |
| *Employee* |  |
| *Supervisor* |  |

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| **C. Behavioral Objectives** |  |

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| --- | --- | --- | --- | --- | --- |
| 5 = Exceptional | 4 = Exceeds Expectations | 3 = Meets Expectations | 2 = Needs Improvement | | 1 = Unsatisfactory |
| 1. **Transformational Impact:** Clearly understands and demonstrates the bank's Mission and PASSION Values, and Clearly understands and demonstrates a Client-focused service attitude. | | | | **self evaluation** 5  4  3  2  1**supervisor evaluation** 5  4  3  2  1 | |
| 1. **Relational Performance:** Employee promotes healthy inter-personal relations among the Employee and clients, Willing to support others in need (Employee or clients), and Willing to take an extra-mile for the benefit of others. | | | | **self evaluation** 5  4  3  2  1**supervisor evaluation** 5  4  3  2  1 | |
| 1. **Time Management and Reporting:** Respects working hours, Timely attendance at client and Employee meetings, Timely and accurate reports, and Timely completion of assigned tasks. | | | | **self evaluation** 5  4  3  2  1**supervisor evaluation** 5  4  3  2  1 | |
| 1. **Communication:** Communicates effectively with co-workers and clients, Open to constructive criticism, Approachable, Composed, Able to manage conflict, listens well, Negotiates effectively. | | | | **self evaluation** 5  4  3  2  1**supervisor evaluation** 5  4  3  2  1 | |
| 1. **Initiative:** Recognizes potential problems and develops solutions, Offers constructive suggestions for improvement, Generates creative ideas and solutions, Takes responsibility for actions, Provides alternatives when making recommendations. | | | | **self evaluation** 5  4  3  2  1**supervisor evaluation** 5  4  3  2  1 | |
| 1. **Leadership and Employee Management** *(managers and team leaders only)*: Contributes to departmental and organizational strategic planning, Delegates work appropriately, takes responsibility for the implementation of branch or departmental objectives, Assists Employee in meeting their goals, Responsive to concerns from Employee. | | | | **self evaluation** 5  4  3  2  1**supervisor evaluation** 5  4  3  2  1 | |
| |  |  | | --- | --- | | **Comments on behavioral objectives:** *(optional)* | | | ***Employee*** |  | | ***Supervisor*** |  |   **D. Which P.A.S.S.I.O.N. values has this year’s performance best supported?** Only select top 1-2 values. | | | | | |

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| **Self evaluation** | | | | | | |
| **Prayer** | **Allegiance** | **Service** | **Stewardship** | **Innovation** | **Optimism** | **Nurturing** |
| **SUPERVISOR evaluation** | | | | | | |
| **Prayer** | **Allegiance** | **Service** | **Stewardship** | **Innovation** | **Optimism** | **Nurturing** |
| Exhibits a prayerful attitude and is committed to taking concerns and successes before the Lord | Exhibits commitment to Christ through Urwego and to excellence in all assigned tasks | Seeks to serve and do whatever it takes to advance Urwego’s ministry | Seeks to be a wise steward of all entrusted resources | Strives to find solutions and to do so without complaint | Consistently encourages co-workers and exemplifies joyfulness in all situations | Shows sensitivity and love to all co-workers and other constituents |

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| **Comments on PASSION value(s) demonstrated:** *(optional)* | |
| *Employee* |  |
| *Supervisor* |  |
| **In 2024, one PASSION value I would like to grow in is …** | |

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| **E. Professional Development Objectives for 2025**  Our goal is to build healthy Employees and leaders who are strong and growing in each of the 5Cs – Christ, Community, Character, Calling, and Competencies. To accomplish development in the 5Cs, we focus on four dynamics of transformation: RISE – Relational, Instructional, Spiritual, and Experiential. These four areas provide a holistic approach to developing our Employees that goes well beyond solely taking a class or reading a book. When defining Employee development objectives keep the 5Cs and RISE in mind.  **Relational** – Built in community; leaders build leaders.  **Instructional** – Direct teaching & guidance to grow in specific ways.  **Spiritual** – Ultimately, God is the One who builds leaders.  **Experiential** – Learn by doing, built through fire; challenging stretch assignments.  Feel free to list as many objectives as you want. We encourage each Employee to have at least one professional development objective. Your supervisor can help keep you accountable. | | |
| **Development Objective(s):** | **Start Month** | **End Month** |
| 1) |  |  |
| >> How can your supervisor or the Staff Development Department help you achieve these objectives? Click or tap here to enter text. | | |
| Result at time of Review: Click or tap here to enter text. | | |
| Employee Comments: Click or tap here to enter text. | | |
| Supervisor Comments: Click or tap here to enter text. | | |

**F.** [**Overall Performance Rating**](http://hrweb.berkeley.edu/performance-management/tools/rating-scale)**:**

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| --- | --- | --- | --- | --- | --- |
| **Self-Evaluation Score:** | **Exceptional** | **Exceeds Expectations** | **Meets Expectations** | **Needs Improvement\*\*** | **Unsatisfactory\*** |
| **Supervisor Score:** | **Exceptional** | **Exceeds Expectations** | **Meets Expectations** | **Needs Improvement\*\*** | **Unsatisfactory\*** |

\*\*If checking Needs Improvement, supervisor should consider a Professional Development Plan for the employee

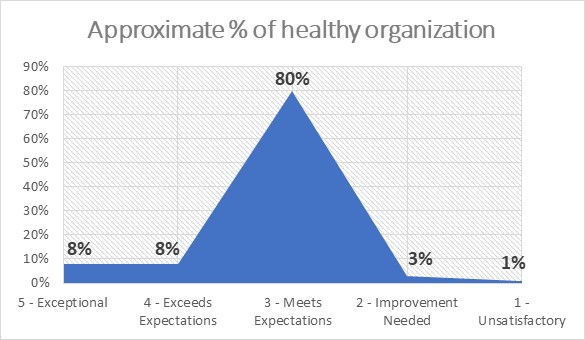
\*If checking Unsatisfactory, supervisor must complete a Performance Improvement Plan (PIP) for the employee

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| **G. Comments on Overall Performance:** Comments are **required** to explain any rating *above* or *below* Meets Expectations. Please note specific behaviors or examples that illustrate where performance needs improvement or exceeds expectations. Highlight opportunities for growth and development. Note accomplishments. |
| **What are up to 3 accomplishments you want to celebrate since the last review?** |
| *Employee* |
| *Supervisor* |
| **What are the employee’s top 3 strengths?** |
| *Employee* |
| *Supervisor* |
| **Where would you like to see improvement? What are up to 3 opportunities for growth before the next review?** |
| *Employee* |
| *Supervisor* |
| **Significant Issues Faced:** *(Optional comments on any external influence that affected ability to achieve the objectives.)* |
| *Employee* |
| *Supervisor* |
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| (if applicable) **Branch Manager** or **Department Head Comments**: |
| (if applicable) **Business Manager** or **Executive** **Comments**: |

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| **H. Signatures:**  **Choose the statement that is correct to you**  Employee accepts the review  Employee is unavailable for signature  Employee refused to sign  *Staff Comment for refusing to sign:*   |  | | --- | | Click here to enter text. |   **Employee:**  My signature indicates I have discussed my job description, review and goals with my supervisor*.*  Name:  Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: Click to enter a date. | **Supervisor:**  Name: Click here to enter text.  Title: Click here to enter text.  Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: Click to enter a date.  **Branch Manager** or **Department Manager** (if required):  Name: Click here to enter text.  Title: Click here to enter text.  Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: Click to enter a date.  **Business Manager** or **Executive** (if required):  Name: Click here to enter text.  Title: Click here to enter text.  Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: Click to enter a date. |

The following table clarifies what each score means. It is imperative that managers understand these descriptions and score Employees uniformly and fairly as much as possible:

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| **Score** | | **Description** |
| **5** | **Exceptional** | Performance far exceeded expectations due to exceptionally high quality of work performed in all *essential* areas of responsibility, resulting in an overall quality of work that was superior; and either 1) included the completion of a major goal or project, or 2) made an exceptional or unique contribution in support of branch, department, or Urwego objectives. This rating is achievable by any employee though given infrequently. |
| **4** | **Exceeds Expectations** | Performance consistently exceeded expectations in all *essential* areas of responsibility, and the quality of work overall was excellent. Annual goals were met. |
| **3** | **Meets Expectations** | Performance consistently met expectations in all *essential* areas of responsibility, at times possibly exceeding expectations, and the quality of work overall was very good. The most critical annual goals were met. |
| **2** | **Improvement Needed** | Performance failed to meet expectations in one or more *essential* areas of responsibility, and/or one or more of the most critical goals were not met. A professional development plan to improve performance must be attached, including timelines, and monitored to measure progress. |
| **1** | **Unsatisfactory** | Performance was consistently below expectations in most *essential* areas of responsibility, and/or reasonable progress toward critical goals was not made. Significant improvement is needed in one or more important areas. A plan to correct performance (PIP), including timelines, must be outlined and monitored to measure progress. |

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