

Polk Regional Water Cooperative (PRWC)

Reviewer: _____

Finance Manager Annual Performance Review (Rev. 2/16/26)

Date: _____

Performance Dimension	Score	Supporting Comments
<i>Evaluate each performance dimension from 1 to 5 using the scale below. Add supporting comments when appropriate.</i>		
I. Fiscal Management/Management of Assets		
<ul style="list-style-type: none"> Thorough and effective preparation/management of budgets 		
<ul style="list-style-type: none"> Effective vendor invoice review/approval 		
<ul style="list-style-type: none"> Monitor compliance with funding/financing sources 		
<ul style="list-style-type: none"> Effective review and reporting of expenditures/balances/cash flow 		
<ul style="list-style-type: none"> Timely tracking/updating of PRWC spending and reimbursements 		
<ul style="list-style-type: none"> Develops, implements and reviews PRWC financial policies 		
<ul style="list-style-type: none"> Oversee annual financial audit and true-up process 		
<ul style="list-style-type: none"> Compliance with bond covenants and financial regulations 		
<ul style="list-style-type: none"> Development and review of insurance program 		
<ul style="list-style-type: none"> Assists PRWC in establishing long-term financial goals 		
II. Leadership		
<ul style="list-style-type: none"> Supports appropriate courses of action & achieves PRWC financial goals 		
<ul style="list-style-type: none"> Plans & organizes responses to requests/complaints/concerns 		
<ul style="list-style-type: none"> Effective at setting appropriate vision and tone with accountants, auditors, and financial advisors 		
III. Policy and Planning		
<ul style="list-style-type: none"> Effectively assists PRWC in establishing long-range policy and goals 		
IV. Outside Stakeholder Relations		
<ul style="list-style-type: none"> Maintains the PRWC's image for service & professionalism 		
<ul style="list-style-type: none"> Inspires an attitude of helpfulness and courtesy 		
V. Communications		
<ul style="list-style-type: none"> Verbal: conducted in an open, responsive, and courteous manner 		
<ul style="list-style-type: none"> Written: understandable, succinct, and audience-appropriate 		
<ul style="list-style-type: none"> Presentations: direct with information easily understood 		
VI. Relationships with PRWC Members		
<ul style="list-style-type: none"> Proper and prompt response to financial requests 		
<ul style="list-style-type: none"> Maintain appropriate liaison with members 		
<ul style="list-style-type: none"> Informs PRWC members of administrative and financial activities 		
VII. Management Style		
<ul style="list-style-type: none"> Sound judgment (rational, reflects the known facts) 		
<ul style="list-style-type: none"> Decisive (appropriately thorough, timely, provides a strategic perspective, etc.) 		
<ul style="list-style-type: none"> Impartial/open (objective, unbiased, and encourages collaboration) 		
Performance Evaluation Scale		
1 = Immediate Improvement	2 = Below Average	3 = Average Performance
4 = Meets Expectations	5 = Exceeds Expectations	