

Annual Review

The annual review is held every December. Feedback here will be used to guide development over the following year.

* Required

Performance

Results achieved during the reporting period. How well those duties inherent to your role, plus all additional duties, formally and informally assigned, were carried out. Reflects aptitude, competence, and commitment to the team's success. Indicators are time and resource management, task prioritization, and tenacity to achieve positive ends consistently.

1. Name *

2. Select the measurement you believe best applies to yourself *

- Does not meet requirements of role and additional duties.
- Meets requirements of role and additional duties. Aptitude, commitment, and competence meet expectations. Results maintain status quo.
- Consistently produces quality results while measurably improving organizational performance. Habitually makes effective use of time and resources. Improves firm procedures and deliverables. Positive impact extends beyond role expectations.
- Results far surpass expectations. Recognizes and exploits new resources; creates opportunities. Emulated; sought after as expert with influence beyond department. Impact significant; innovative approaches to problems produce significant gains in quality and efficiency.

Proficiency

Demonstrates technical knowledge and practical skill in the execution of overall duties. Combines training, education, and experience. Translates skills into actions which contribute to accomplishing tasks and mission. Imparts knowledge to others.

3. Select the measurement you believe best applies to yourself *

- Not competent. Does not possess the requisite range of skills and knowledge commensurate with role and experience.
- Competent. Possesses the requisite range of skills and knowledge commensurate with grade and experience. Understands and articulates basic functions related to mission accomplishment.
- Demonstrates mastery of all required skills. Expertise, education and experience consistently enhance mission accomplishment. Innovative troubleshooter and problem solver. Effectively imparts skills to subordinates.
- True expert in field. Knowledge and skills impact far beyond those of peers. Translates broad-based education and experience into forward thinking, innovative actions. Makes immeasurable impact on mission accomplishment. Peerless teacher, selflessly imparts expertise to subordinates, peers, and seniors.

Effectiveness Under Stress

Thinking, functioning and leading effectively under conditions of mental pressure. Maintaining composure appropriate for the situation, while displaying steady purpose of action, enabling one to inspire others while continuing to lead under adverse conditions. Emotional strength, resilience and endurance are elements.

4. Select the measurement you believe best applies to yourself *

- Does not exhibit discipline and stability under pressure. Judgment and effective problem-solving skills are not evident.
- Exhibits discipline and stability under pressure. Judgment and effective problem-solving skills are evident.
- Consistently demonstrates maturity, mental agility, and willpower during periods of adversity. Provides order to chaos through the application of intuition, problem-solving skills, and leadership. Composure reassures others.
- Demonstrates seldom-matched presence of mind under the most demanding circumstances. Stabilizes any situation through the resolute and timely application of direction, focus and personal presence.

Initiative

Action in the absence of specific direction. Seeing what needs to be done and acting without prompting. The instinct to begin a task and follow through energetically on one's own accord. Being creative, proactive and decisive. Transforming opportunity into action.

5. Select the measurement you believe best applies to yourself *

- Demonstrates lack of willingness to take action in the absence of specific direction.
- Demonstrates willingness to take action in the absence of specific direction. Acts commensurate with role, training, and experience.
- Self-motivated and action-oriented. Foresight and energy consistently transform opportunity into action. Develops and pursues creative, innovative solutions. Acts without prompting. Self-starter.
- Highly motivated and proactive. Displays exceptional awareness of surroundings and environment.
- Uncanny ability to anticipate mission requirements and quickly formulate original, far-reaching solutions. Always takes decisive, effective action.

Leading Subordinates

The inseparable relationship between leader and led. The application of leadership principles to provide direction and motivate subordinates. Using authority, persuasion, and personality to influence subordinates to accomplish assigned tasks. Sustaining motivation and morale while maximizing subordinates' performance.

6. Select the measurement you believe best applies to yourself *

- Not engaged; fails to provide instruction and direct execution. Does not seek to accomplish mission in ways that sustain motivation and morale.
- Engaged; provides instructions and directs execution. Seeks to accomplish mission in ways that sustain motivation and morale. Actions contribute to firm effectiveness.
- Achieves a highly effective balance between direction and delegation. Effectively tasks subordinates and clearly delineates standards expected. Enhances performance through constructive supervision. Fosters motivation and enhances morale. Builds and sustains teams that successfully meet mission requirements. Encourages initiative and candor among subordinates.
- Promotes creativity and energy among subordinates by striking the ideal balance of direction and delegation. Achieves highest levels of performance from subordinates by encouraging individual initiative. Engenders willing subordination, loyalty, and trust that allow subordinates to overcome their perceived limitations. Personal leadership fosters highest levels of motivation and morale, ensuring mission accomplishment even in the most difficult circumstances.

Developing Subordinates

Commitment to train, educate, and challenge all staff. Mentorship. Cultivating professional and personal development of subordinates. Developing team players and a culture of “we”. Ability to combine teaching and coaching. Creating an atmosphere tolerant of mistakes in the course of learning.

7. Select the measurement you believe best applies to yourself *

Fails to maintain an environment that allows personal and professional development. Fails to ensure subordinates participate in mandated development programs.

Maintains an environment that allows personal and professional development. Ensures subordinates participate in all mandated development programs.

Develops and institutes innovative programs, to include continuing education, that emphasize personal and professional development of subordinates. Challenges subordinates to exceed their perceived potential thereby enhancing morale and effectiveness. Creates an environment where all staff are confident to learn through trial and error. As a mentor, prepares subordinates for increased responsibilities and duties.

Widely recognized and emulated as a teacher, coach and leader. Any staff would desire to serve with this leader because they know they will grow personally and professionally. Subordinate and group performance far surpassed expected results due to leader’s mentorship and team building talents. Attitude toward subordinate development is infectious, extending beyond the team.

Setting the Example

The most visible facet of leadership: how well a staff serves as a role model for all others. Personal action demonstrates the highest standards of conduct and ethical behavior. Bearing, demeanor, and self-discipline are elements.

8. Select the measurement you believe best applies to yourself *

- Fails to adhere to the tenets of the firm's mission, vision, and values.
- Adheres to the tenets of the firm's mission, vision, and values.
- Personal conduct on and off the job reflects highest standards of integrity, bearing and character.
- Actively seeks self-improvement in wide-ranging areas. Dedication to professional example encourages others' self-improvement efforts.
- Model staff, frequently emulated. Exemplary conduct, behavior, and actions are tone-setting. An inspiration to subordinates, peers, and seniors. Remarkable dedication to improving self and others.

Communication Skills

The efficient transmission and receipt of thoughts and ideas that enable and enhance leadership. Equal importance given to listening, speaking, writing, and critical reading skills. Interactive, allowing one to perceive problems and situations, provide concise guidance, and express complex ideas in a form easily understood by everyone. Allows subordinates to ask questions, raise issues and concerns, and venture opinions. Contributes to a leader's ability to motivate as well as counsel.

9. Select the measurement you believe best applies to yourself *

- Unable to effectively receive and convey information.
- Skilled in receiving and conveying information. Communicates effectively in performance of duties.

Clearly articulates thoughts and ideas, verbally and in writing. Communication in all forms is accurate, intelligible, concise, and timely. Communicates with clarity and verve, ensuring understanding of intent or purpose. Encourages and considers the contributions of others.
- Highly developed facility in verbal communication. Adept in composing written documents of the highest quality. Combines presence and verbal skills that engender confidence and achieve understanding irrespective of the setting, situation, or size of the group addressed. Displays an intuitive sense of when and how to listen.

Decision Making Ability

Viable and timely problem solution. Contributing elements are judgment and decisiveness. Decisions reflect the balance between an optimal solution and a satisfactory, workable solution that generates tempo. Decisions are made within the context of the CEO's established intent and the goal of mission accomplishment. Anticipation, mental agility, intuition, and success are inherent.

10. Select the measurement you believe best applies to yourself *

- Fails to make sound decisions leading to mission accomplishment. Does not confidently approach problems.
- Makes sound decisions leading to mission accomplishment. Actively collects and evaluates information and weighs alternatives to achieve timely results. Confidently approaches problems; accepts responsibility for outcomes.
- Demonstrates mental agility; effectively prioritizes and solves multiple complex problems. Analytical abilities enhanced by experience, education, and intuition. Anticipates problems and implements viable, long-term solutions. Steadfast, willing to make difficult decisions.
- Widely recognized and sought after to resolve the most critical, complex problems. Seldom matched analytical and intuitive abilities; accurately foresees unexpected problems and arrives at well-timed decisions despite fog and friction. Completely confident approach to all problems. Masterfully strikes a balance between the desire for perfect knowledge and greater tempo.

Judgment

The discretionary aspect of decision making. Draws on core values, knowledge, and personal experience to make wise choices. Comprehends the consequences of contemplated courses of action.

11. Select the measurement you believe best applies to yourself *

- Minority of judgments are measured, circumspect, relevant, and correct.
- Majority of judgments are measured, circumspect, relevant, and correct.
- Decisions are consistent and uniformly correct, tempered by consideration of their consequences.
- Able to identify, isolate, and assess relevant factors in the decision making process. Opinions sought by others. Subordinates personal interests in favor of impartiality.
- Decisions reflect exceptional insight and wisdom beyond this staff's experience. Counsel sought by all; often an arbiter. Consistent, superior judgment inspires the confidence of seniors.

Rate Your Skill set

Being a successful accountant requires myriad skills. Below are some of the major skills required for success.

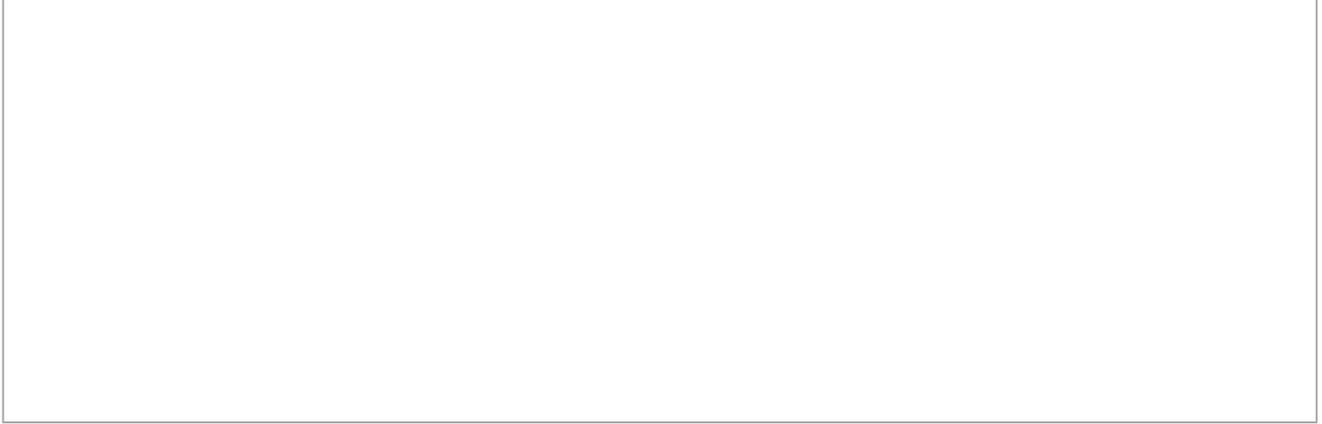
12. Review the items below. Rate yourself on these skill sets relative to each other. (E.g., if you feel that of the five skill sets listed below, your best is attention to detail, rate that item as '1'). The 1 to 5 scale is intended to create a hierarchy of skill sets, so use each rating only once (i.e., select '1' once). *

	1 (Best)	2	3	4	5 (Needs Most Improvement)	N/A
Attention to detail	<input type="radio"/>	<input type="radio"/>				
Ability to finish a project in a timely manner	<input type="radio"/>	<input type="radio"/>				
Ownership of assigned work	<input type="radio"/>	<input type="radio"/>				
Technical knowledge for role	<input type="radio"/>	<input type="radio"/>				
Client communication	<input type="radio"/>	<input type="radio"/>				

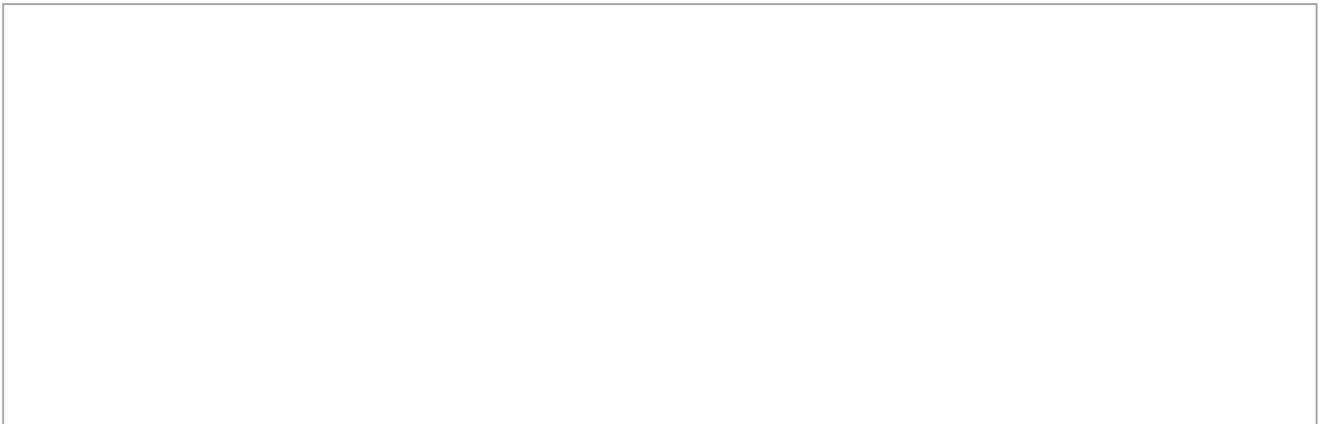
Feedback

Respond to the statements or questions below. Be as detailed as possible. Some items are general statements; respond with your feelings or observations about the statement.

13. The firm functions as a team. *



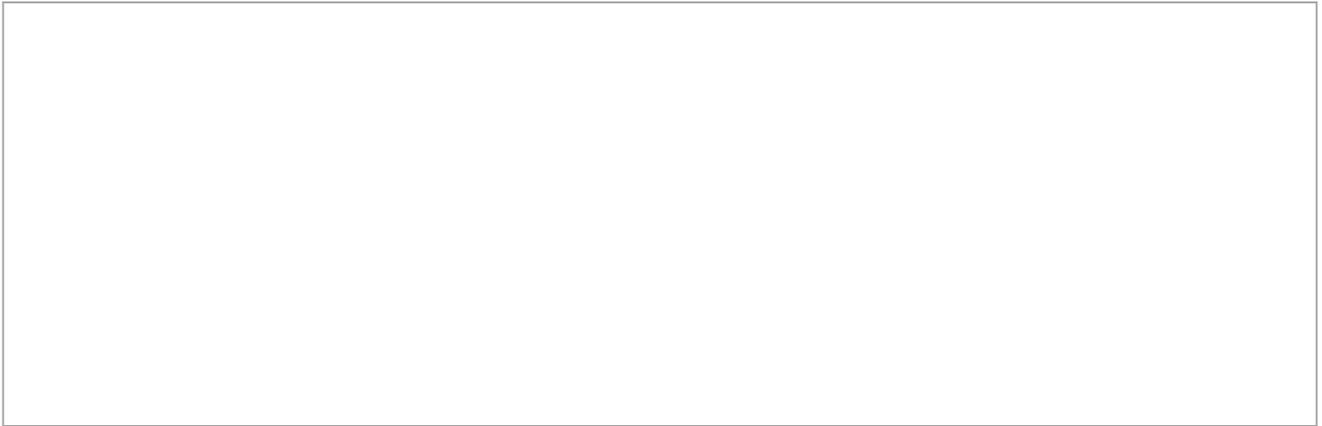
14. Everyone at the firm is critical to the success of the business. *



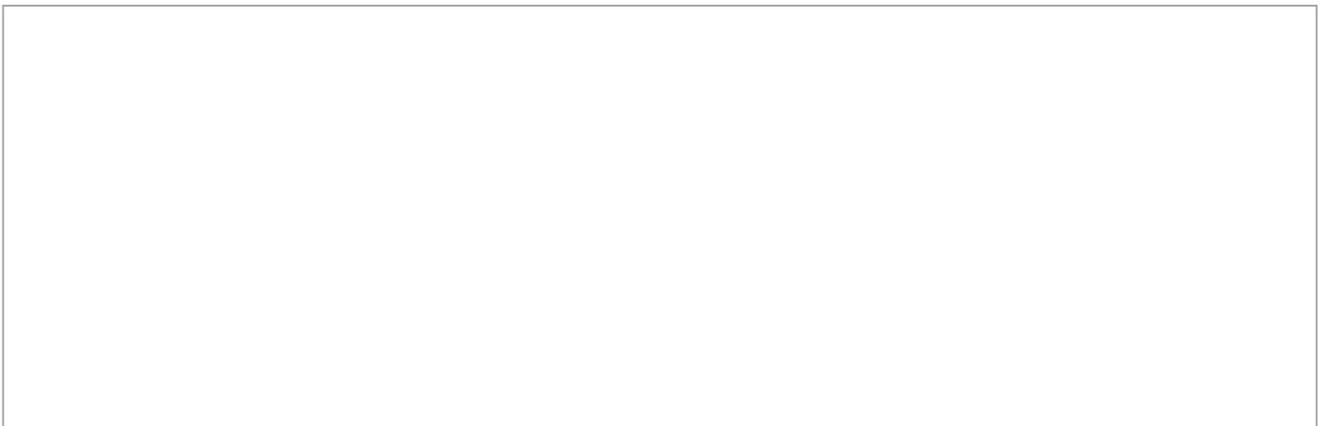
15. I am learning a lot. *



16. I enjoy my work. *



17. I understand my role in the firm. *



18. If I could change something thing at work, I would... *

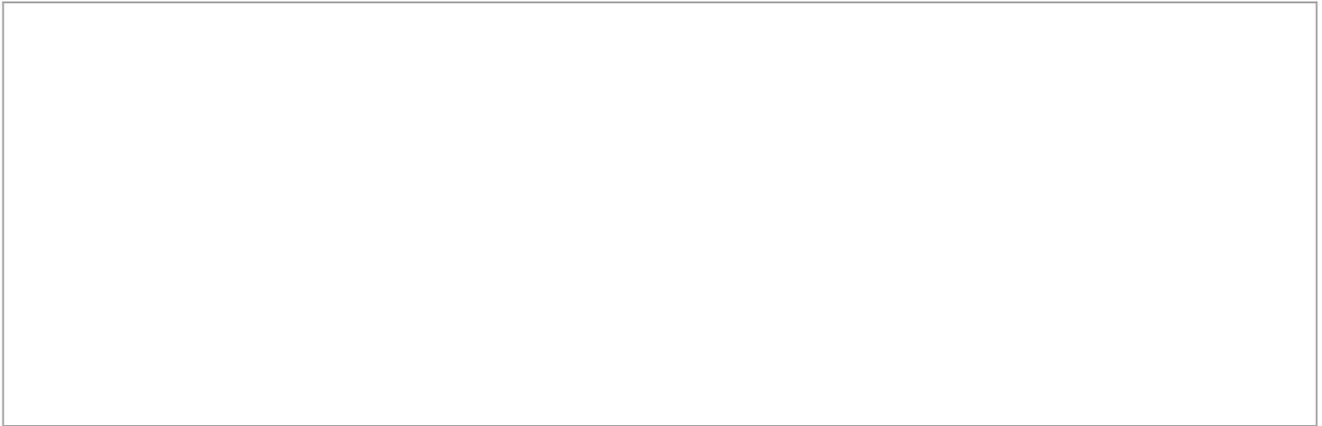
19. I am a valued team member *

20. My biggest contribution to the firm this year was... *

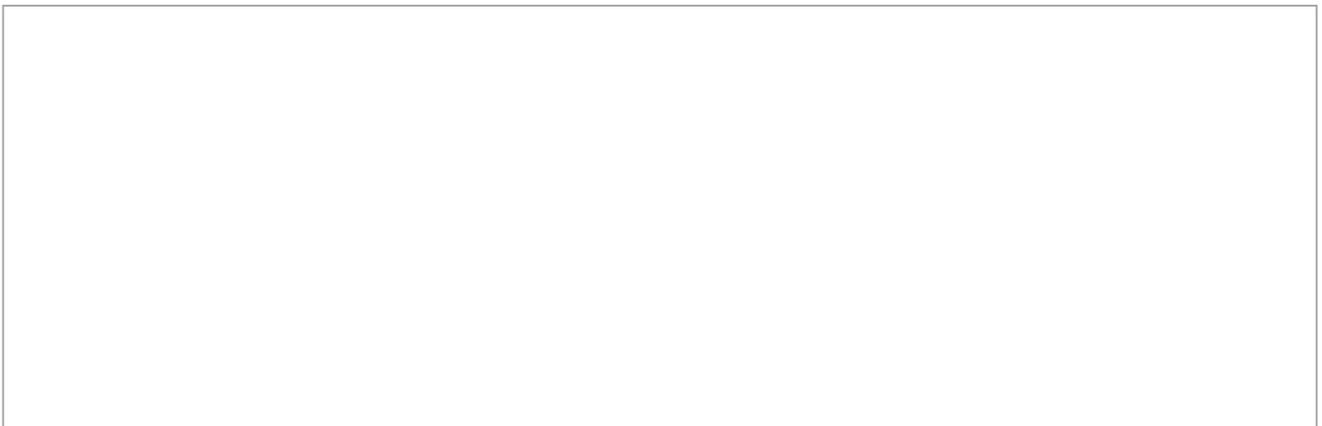
21. Next year, I want to... *

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22. My top three goals for next year are... *

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23. I don't understand... *

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24. Provide a link to any specific training you are interested in pursuing

25. My best experience this year was... *

26. The mistake I learned the most from this year was... *

27. I receive honest and meaningful feedback from Matt and/or other team members. *

28. Number of books read/listened to in 2020 *

29. Provide feedback on team members based on your experiences this year *

30. Anything else? This section is for anything you want to get off your chest, any ideas you have, or anything else that is important to you. *

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