

## GENERAL MANAGER APPRAISAL REPORT

Management is traditionally charged with managing “land, labor, and capital.” This responsibility is accomplished by using the management functions of planning, organizing, and controlling. Therefore, this appraisal report is divided into those six general areas. Specific items will be addressed under each of the six major areas. Specific areas will be rated first and then an overall rating given for that area. The rating of each major area will be justified with written comments.

The following ratings will be used in evaluating the various sections of this report:

- F - Fair:** Performance usually meets standards, but improvement is possible and desirable.
- G - Good:** Performance meets and sometimes exceeds standards. Contributions are consistent and reliable.
- C - Commendable:** Performance often exceeds standards or expectations. Considerable initiative has been exhibited.

### I. Land (facilities and equipment)

#### A. Specific Indicators:

- |   |   |   |   |
|---|---|---|---|
| 1. Adequacy of facilities and equipment. How well does the general manager analyze equipment and facility needs and make appropriate recommendations? | F | G | C |
| 2. How well is the physical plant repaired and maintained-quality of elevators, fertilizer plants, and other building and equipment?                  | F | G | C |
| 3. Do facilities and equipment appear clean and attractive?   | F | G | C |

<b>B. Rate the manager's overall performance in managing and equipment.</b>	F	G	C
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#### C. Comments:

### II. Labor (including employees, board, and patrons)

#### A. Specific Indicators - Employees:

- |   |   |   |   |
|---|---|---|---|
| 1. Do cooperative employees appear to enjoy their work?   | F | G | C |
| 2. Are employees given performance appraisals regularly?<br>Are they provided training and development opportunities? | F | G | C |

3. Does the cooperative have sufficient backup in key positions? Can the cooperative operate effectively when the manager is absent?	F	G	C
4. How well does the manager resolve conflicts among employees and between employees and patrons?	F	G	C
B. Rate the manager's overall performance in handling employees?	F	G	C
C. Comments:			
D. Specific Indicators - Board:			
1. Does the board receive information on a timely basis? Is the information sufficient for the board to make informed decisions?	F	G	C
2. Does the general manager provide leadership and direction to the board?	F	G	C
3. Does the general manager make good, timely decisions? Are the decisions made within the sphere of management?	F	G	C
4. Does the general manager create an atmosphere of trust and make the board comfortable with management decisions?	F	G	C
E. Rate the manager's overall performance in relating with the board.	F	G	C
F. Comments:			
G. Specific Indicators - Patrons/Public:			
1. Does the general manager project a positive image to the patrons? Is he/she respected in the community?	F	G	C
2. Does the general manager provide effective communication to members regarding cooperative activities?	F	G	C
3. Does the general manager respond promptly and effectively to resolve patron concerns or complaints?	F	G	C
4. Does the general manager and staff strive toward prompt and courteous service to patrons?	F	G	C

- |  |          |          |          |
|--|----------|----------|----------|
| 5. Does the general manager have a good working relationship with the cooperative's lender?                  | <b>F</b> | <b>G</b> | <b>C</b> |
| 6. Does the general manager have a good working relationship with the cooperative's regional cooperative(s)? | <b>F</b> | <b>G</b> | <b>C</b> |
| 7. <b>Does</b> the general manager participate in community affairs in an effort to promote the cooperative? | <b>F</b> | <b>G</b> | <b>C</b> |

<b>H. Rate the manager's overall performance in dealing with patrons and the general public.</b>	<b>F</b>	<b>G</b>	<b>C</b>
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I. Comments:

### III. Capital (financial affairs)

#### A. Profitability Ratios:

	Standard	Actual			
1. Local Return on Sales	_____		F	G	C
2. Local Return on Local Assets	- - - - -	_____	F	G	C

#### B. Liquidity Ratios:

1. Interest Coverage Ratio	_____		F	G	C
2. Current Ratio	_____ - -	_____	F	G	C
3. Working Capital to Sales	- - _____	- - - - -	F	G	C
4. Days' Sales in Accounts Receivable	_____	_____	F	G	C
5. Debt Service Ratio	_____	_____ - - - -	F	G	C

#### C. Efficiency Ratios:

<b>1. Firm Productivity Ratio</b>	_____ - - -	_____ - -	F	G	C
<b>2. Labor Income Ratio</b>	_____	_____	F	G	C

#### D. Solvency Ratios:

1. Local Leverage Ratio	_____		F	G	C
2. Term Debt to Fixed Assets	_____		F	G	C
3. Ownership Ratio	_____		F	G	C

E. Rate the overall financial management of the cooperative including financial strength, earnings performance, and financial improvement.	F	G	C
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F. Comments:

#### IV. Planning

A. Specific Indicators:

- |  |   |   |   |
|--|---|---|---|
| 1. How well does the general manager provide vision and foresight to the board?                      | F | G | C |
| 2. How effectively does the general manager include the board and the staff in the planning process? | F | G | C |
| 3. How well are the plans implemented and the results evaluated?                                     | F | G | C |
| 4. How accurate and adequate is the budget process?  | F | G | C |

B. Rate the overall performance of the general manager <b>in the planning process.</b>	F	G	C
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C. Comments:

#### V. Organizing

A. Specific Indicators:

- |  |   |   |   |
|--|---|---|---|
| 1. Does the general manager have and use an effective organization chart outlining chain of command and reporting relationships? | F | G | C |
| 2. Does the general manager have in place current job descriptions for each position in the company?                             | F | G | C |
| 3. Does the general manager appear to delegate effectively to department heads or key employees?                                 | F | G | C |

B. Rate the overall performance of the general manager in effectively organizing the cooperative.	F	G	C
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C. Comments:

## VI Controlling

### A. Specific Indicators:

- |  |   |   |   |
|--|---|---|---|
| 1. Are monthly financial statements accurate and timely?   | F | G | C |
| 2. Are year-end statements reasonably close to information provided in monthly financial statements? | F | G | C |
| 3. Are additions to fixed assets within the parameters of board policies?                            | F | G | C |
| 4. Is the board's credit policy implemented and administered appropriately?                          | F | G | C |
| 5. Are short-term loans used properly to minimize interest expense?                                  | F | G | C |
| 6. Are relevant policies and procedures in place to minimize problems?                               | F | G | C |

- |  |   |   |   |
|--|---|---|---|
| B. Rate the overall performance of the general manager in establishing and administering an adequate control system. | F | G | C |
|--|---|---|---|

### C. Comments:

## VII. Summary

1. What are the general manager's strength and in what ways does he/she contribute best to the success of the cooperative?

2. What are the most significant weaknesses that need to be corrected?

3. During the next 12 months, the board will expect the general manager to:

4. Based on this evaluation the board rates the general manager's overall performance:

☐ Fair

☐ Good

☐ Commendable

This appraisal of my performance has been reviewed with me by the chairman of the board. I accept this appraisal of my performance for the past 12 months and will strive to improve upon those areas as noted.

General Manager \_\_\_\_\_ Date \_\_\_\_\_

Chairman,  
Board of Directors \_\_\_\_\_ Date \_\_\_\_\_