

## SAMPLE LOAN OFFICER SPM EVALUATION CRITERIA TABLE

LOAN OFFICER RESPONSIBILITIES	EVALUATION CRITERIA
Recruit clients who fit with the institution's target criteria	<ul style="list-style-type: none"> <li>Percentage of target clients (e.g., youth; women) in loan officer's portfolio</li> </ul>
Collect social data on clients	<ul style="list-style-type: none"> <li>Number of client surveys conducted</li> <li>Accuracy of client data collection</li> </ul>
Respond to client complaints	<ul style="list-style-type: none"> <li>Number of client complaints received</li> <li>Number of client complaints resolved</li> </ul>
Maintain high portfolio quality	<ul style="list-style-type: none"> <li>PAR &gt; 30</li> <li>Client retention, by loan cycle</li> </ul>
Treat clients respectfully	<ul style="list-style-type: none"> <li>% renewed loans</li> <li>Client complaints registered against employee</li> <li>Client satisfaction with employee</li> </ul>

