

[ORGANIZATION] PERFORMANCE EVALUATION

ESSENTIAL JOB FUNCTIONS

Date: \_\_\_\_\_

Name: \_\_\_\_\_

Page \_\_\_\_ of \_\_\_\_

Appraised by: \_\_\_\_\_

Position Title: \_\_\_\_\_

Department: \_\_\_\_\_

ESSENTIAL FUNCTIONS	PERFORMANCE STANDARDS	RATING*	APPRAISAL (comments)

\* Appraisal Key:    4 = Exceeds Performance Standards    2 = Work Approaches Standards  
                          3 = Meets Performance Standards        1 = Does Not Meet Standards

[ORGANIZATION] PERFORMANCE EVALUATION

WORK BEHAVIORS

Date: \_\_\_\_\_

Name: \_\_\_\_\_

Page \_\_\_\_ of \_\_\_\_

WORK BEHAVIORS	ORGANIZATION EXPECTATIONS	RATING	APPRAISAL (comments)

[ORGANIZATION] PERFORMANCE EVALUATION

IRREGULAR OR UNPLANNED WORK

Date: \_\_\_\_\_

Name: \_\_\_\_\_

Page \_\_\_\_ of \_\_\_\_

IRREGULAR OR UNPLANNED WORK PERFORMED	COMMENTS

[ORGANIZATION] PERFORMANCE EVALUATION

GOAL SETTING AND PLANNING

Date: \_\_\_\_\_

Name: \_\_\_\_\_

Page \_\_\_\_ of \_\_\_\_

	STEPS NECESSARY TO ACHIEVE GOALS	COMPLETION DATE/COMMENTS
JOB-RELATED GOALS		
PROFESSIONAL DEVELOPMENT GOALS		

[ORGANIZATION] PERFORMANCE EVALUATION

EVALUATION SUMMARY

Date: \_\_\_\_\_

Name: \_\_\_\_\_

Page \_\_\_\_ of \_\_\_\_

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Summary Rating: Put an "X" where the description most closely describes overall job performance.

- ( ) EXCEEDS STANDARDS. Far exceeds normal expectations. Seldom equaled in overall contribution to department and/or commission goals.
- ( ) MEETS STANDARDS. Performance is what is expected of a fully qualified and experienced person in the position. Sometimes performs with excellence, but not consistently.
- ( ) APPROACHING STANDARDS. Usually performs to job requirements. Needs supervision for complete and on-time results. Could result from being new on job.
- ( ) DOES NOT MEET STANDARDS. Not performing to the requirements of the job. Needs a high degree of supervision and direction. May not have background to grasp the work. Needs to be aware of performance deficiencies and work immediately to correct.

\_\_\_\_\_  
Employee Signature \*

\_\_\_\_\_  
Date

\* Your signature does not imply that you agree with any or all of the evaluation remarks, only that you have been given an opportunity to participate in the process and have seen this review.

\_\_\_\_\_  
Supervisor Signature

\_\_\_\_\_  
Date

EMPLOYEE COMMENTS: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## EMPLOYEE SELF-EVALUATION FORM

[ORGANIZATION] is committed to developing and helping all of its employees grow and develop their full potential. To further this effort, employees are asked to evaluate their own performance. Your responses to the questions below will aid in providing a complete and accurate performance review. If, for some reason, a question is not applicable to your position, please check "Not Rated."

\_\_\_\_\_  
Name of Employee

\_\_\_\_\_  
Date

1. I believe that I:

- a. Give advice or assistance freely when asked, respond to requests for information, questions, or suggestions in a timely manner; don't hold up the work of others unnecessarily with delays if at all possible.

Consistently       Usually       Sometimes       Rarely       Not rated

Comments:

- b. Keep others informed about the progress of my work that impacts their work, and let them know when deadlines or timelines are changed.

Often       Occasionally       Seldom       Not at all       Not rated

Comments:

- c. Work safely; follow established safety practices and procedures.

Consistently       Usually       Sometimes       Rarely       Not rated

Comments:

- d. Demonstrate initiative in how I do my work and ensure its accomplishment.

Consistently       Usually       Sometimes       Rarely       Not rated

Comments:

- e. Am receptive to ideas and suggestions for new or different systems or approaches.

Very receptive       Somewhat receptive       Not receptive       Not rated

Comments:

f. Am reliable and dependable when dealing with other staff members; do what I say I will do.

Consistently       Usually       Sometimes       Rarely       Not rated

Comments:

g. Treat other employees in a manner which creates a feeling of mutual respect.

Consistently       Usually       Sometimes       Rarely       Not rated

Comments:

h. Treat customers, vendors, and other outside contacts with courtesy, consideration, and helpfulness.

Consistently       Usually       Sometimes       Rarely       Not rated

Comments:

2. On a scale of 1 to 4 (1=low, 4=high), rate your work quality and quantity; explain your ratings.

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3. Do you feel that you fall below, meet, or exceed your supervisor's and organization's expectations, and why?

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4. What do you feel you have accomplished or improved upon since your last review (or hire date, if you have not previously had a review)?

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5. Are there any areas in which you feel you could improve? If so, what are they and what type of improvement is necessary?

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6. Overall, how well do you feel you perform your job duties and responsibilities?

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7. What do you need from your supervisor or the organization to help you perform your job? Why?

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**MANAGERIAL/SUPERVISORY EVALUATION FORM**

(Insert this page in the performance review if the individual being reviewed has supervisory and/or management responsibilities.)

BUDGET/FISCAL RESPONSIBILITY - Develops realistic budgets, manages within established parameters.

- 1 - Does not comprehend budget responsibility.
- 2 - Needs improvement relative to budget process and expense management.
- 3 - Develops budget guidelines and has minimal variance.
- 4 - Exceptional ability to forecast and manage expenditures without compromising results.

Comments/Examples:

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PLANNING/ORGANIZATION – Plans, organizes information, defines and prioritizes tasks, and develops resources to meet organizational needs.

- 1 - Crisis management style; no planning evident
- 2 - Deals with current situation only. Needs more long range thinking.
- 3 - Thinks ahead. Sees needs and reacts quickly to new priorities. Good at planning for future situations.
- 4 - Thinks strategically and is able to combine resources and information with exceptional skill to deal with current and future issues.

Comments/Examples:

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MANAGING – Develops efficient methods of tracking organizational activities and effectively utilizes resources. Establishes guidelines and sets priorities to direct subordinates. Delegates proper authority and workload.

- 1 - Poor utilization of resources, both personnel and physical.
- 2 - Delegation and work results can improve to meet organizational needs.
- 3 - Work is well distributed and completed as scheduled.
- 4 - Results of efforts are more than expected; efficiency and effectiveness are at highest level.

Comments/Examples:

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MOTIVATING EMPLOYEES – Gives constructive feedback. Seeks information from subordinates when problems arise. Gives clear and logical reasons for decision. Handles emotional behavior effectively. Gives recognition for positive results.

- 1 - Little effort expended to motivate or recognize people. Insensitive to others' needs. Subordinates do not see supervisor as role model
- 2 - Does not take sufficient responsibility for motivating subordinates. Needs improvement. Needs to strengthen supervisor/subordinate relationship.
- 3 - Understands the need to provide motivational atmosphere for employees to achieve good work, and creates good work environment.
- 4 - Creates a most positive and highly effective work environment and encourages self and employees to give best effort.

Comments/Examples:

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DEVELOPING EMPLOYEE PERFORMANCE - Clearly tells employee what is expected and how their work will affect business goals. Allows time for, and encourages, career development and job-skills training. Recognizes employee limitations and uses coaching and delegation to encourage improvement. Takes corrective action promptly when needed.

- 1 - Spends no time with and makes no effort to develop subordinates.
- 2 - Seldom spends time with individuals except to give instructions and correct problems.
- 3 - Understands the responsibility and takes subordinate development seriously.
- 4 - Highly skilled at focusing on individual performance and encouraging employees to do their best. Helps employees take responsibility for improving their performance.

Comments/Examples:

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MANAGING CHANGE/INNOVATION - Explains to employees why change is necessary and what will be required. Asks for employee input to clear up misunderstandings. Seeks and uses employee ideas on how to make change go as smoothly as possible. Monitors and reinforces progress.

- 1 - Contributes to an environment where people are fearful of change.
- 2 - Resists change and promotes an environment of status quo. Needs to recognize value of change and be less resistant.
- 3 - Recognizes that change is part of the work process and takes responsibility for working with employees to make the changes.
- 4 - Creates and sustains a climate that accepts change as part of the work process and stresses the importance of working smarter.

Comments/Examples:

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MAKING ORGANIZATIONAL IMPACT - Maintains effective relationship with organization top management. Maintains a constructive relationship and confronts issues to achieve positive results. Understands the business and generates ideas to improve overall operations.

- 1 - Makes no effort to build positive relationships with managers and peers, seldom offers any ideas.
- 2 - Seldom collaborates with other departments or people. Needs to get more involved with whole business.
- 3 - Recognizes the value of peer and management support in getting the job done. Offers ideas and participates in overall organization processes.
- 4 - Takes initiative to effectively build trust and creates allies in all parts of the organization. Is highly interested and committed to organization goals.

Comments/Examples:

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MANAGERIAL/SUPERVISORY BEHAVIOR RATING IS TO BE INCLUDED WITH PERFORMANCE APPRAISAL AND DEVELOPMENT GUIDE FOR:

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Department/Division: \_\_\_\_\_

Job Classification: \_\_\_\_\_

By: \_\_\_\_\_

## TEAM MEMBER EVALUATION FORM

\_\_\_\_\_  
Name of Team Member

\_\_\_\_\_  
Position

1. Maintains awareness of both internal and external client needs, and makes the effort to respond to those needs.

Consistently       Usually       Sometimes       Rarely       Not rated

Comments: \_\_\_\_\_  
\_\_\_\_\_

2. Is alert to opportunities to expand on technical knowledge, skills, or experience.

Consistently       Usually       Sometimes       Rarely       Not rated

Comments: \_\_\_\_\_  
\_\_\_\_\_

3. Considers audience addressed, listens, and provides concise and timely oral and written information. Keeps other team members informed of progress and shares information with others to help everyone do his/her job better.

Consistently       Usually       Sometimes       Rarely       Not rated

Comments: \_\_\_\_\_  
\_\_\_\_\_

4. Exhibits teamwork skills: considers the team effort as more important than his/her own individual efforts; is sensitive to the needs and opinions of other team members; participates openly and honestly; shares opinions, knowledge, and experience with others; and pitches in to help even when someone else is responsible for the job.

Consistently       Usually       Sometimes       Rarely       Not rated

Comments: \_\_\_\_\_  
\_\_\_\_\_

5. Actively checks for accuracy of data received or generated before passing it on.

Consistently       Usually       Sometimes       Rarely       Not rated

Comments: \_\_\_\_\_  
\_\_\_\_\_

6. Is proactive rather than reactive and pursues opportunities or takes action before being asked.

Consistently       Usually       Sometimes       Rarely       Not rated

Comments: \_\_\_\_\_  
\_\_\_\_\_

7. Considers how his/her work impacts operating efficiency and focuses on both the long-term and short-term consequences of his/her actions. Seeks opportunities to improve performance and feedback to improve and measure performance.

Consistently       Usually       Sometimes       Rarely       Not rated

Comments: \_\_\_\_\_  
\_\_\_\_\_

8. Is able to articulate several perspectives on a problem and see the merit of differing points of view. Able to change or modify strong opinions, switch to alternative strategies when necessary, and adjust to changing work priorities.

Consistently       Usually       Sometimes       Rarely       Not rated

Comments: \_\_\_\_\_  
\_\_\_\_\_

9. Looks for new and better ways to do things and is not content with the status quo. Questions traditional ways of doing things when choosing a new course of action or finds new combinations of old elements to form innovative solutions.

Consistently       Usually       Sometimes       Rarely       Not rated

Comments: \_\_\_\_\_  
\_\_\_\_\_

10. Recognizes that greater returns require greater risks. Takes actions where outcomes are less certain but where potential rewards are greater.

Consistently       Usually       Sometimes       Rarely       Not rated

Comments: \_\_\_\_\_  
\_\_\_\_\_

11. Builds consensus. Stimulates cooperation between team members and other teams to develop agreeable solutions. Encourages give-and-take discussions to ensure all concerns are addressed before an action is taken.

Consistently       Usually       Sometimes       Rarely       Not rated

Comments: \_\_\_\_\_  
\_\_\_\_\_

12. Provides help to other team members by giving them candid feedback and support to succeed. Makes developing other team members an important objective and expresses confidence in their ability to do the job.

Consistently       Usually       Sometimes       Rarely       Not rated

Comments: \_\_\_\_\_  
\_\_\_\_\_

13. Understands the need to achieve the organization's objectives through others and gives others room to act in accomplishing these objectives.

Consistently       Usually       Sometimes       Rarely       Not rated

Comments: \_\_\_\_\_  
\_\_\_\_\_

Consider individual and team objectives established and discussed throughout the review period. Attach additional pages if necessary.

Objective: \_\_\_\_\_

Result: \_\_\_\_\_  
\_\_\_\_\_

Objective: \_\_\_\_\_

Result: \_\_\_\_\_  
\_\_\_\_\_

Objective: \_\_\_\_\_

Result: \_\_\_\_\_  
\_\_\_\_\_

Objective: \_\_\_\_\_

Result: \_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
Name of Reviewer

\_\_\_\_\_  
Signature of Reviewer

\_\_\_\_\_  
Date of Review

\_\_\_\_\_  
Name of Employee

\_\_\_\_\_  
Signature of Employee

\_\_\_\_\_  
Date of Review

(Note: Signature of employee does not imply agreement, but rather that the review was covered with the employee.)

## CO-WORKER INPUT FORM

[ORGANIZATION] is committed to developing and helping all its employees grow and develop their full potential. To further this effort, employees are asked to provide input regarding their co-workers' job performance. Your answers to these questions are important. If for any reason you feel you cannot answer a question or have no basis for comment, please check "Not Rated."

\_\_\_\_\_  
Name of Co-worker

\_\_\_\_\_  
Date

In working with this person, it appears that s/he:

1. Gives advice or assistance when asked; doesn't hoard information that might be of assistance to my work.

Consistently       Usually       Sometimes       Rarely       Not rated

Comments:

2. Keeps me informed about the progress of his/her work that impacts the work that I do, and lets me know when deadlines or timelines are changed.

Often       Occasionally       Seldom       Not at All       Not rated

Comments:

3. Is a safe worker; follows established safety practices and procedures.

Consistently       Usually       Sometimes       Rarely       Not rated

Comments:

4. Responds to request for information, questions, or suggestions in a timely manner; doesn't hold up my work unnecessarily with delays.

Consistently       Usually       Sometimes       Rarely       Not rated

Comments:

5. Is receptive to ideas and suggestions for new or different systems or approaches.

Very receptive       Somewhat receptive       Not receptive       Not rated

Comments:

6. Is reliable and dependable when dealing with other staff members; does what s/he says s/he will do.

\_\_\_ Consistently      \_\_\_ Usually      \_\_\_ Sometimes      \_\_\_ Rarely      \_\_\_ Not rated

Comments:

7. Treats me and other employees in a manner which creates a feeling of mutual respect.

\_\_\_ Consistently      \_\_\_ Usually      \_\_\_ Sometimes      \_\_\_ Rarely      \_\_\_ Not rated

Comments:

8. Treats customers, vendors, and other outside contacts with courtesy, consideration, and helpfulness.

\_\_\_ Consistently      \_\_\_ Usually      \_\_\_ Sometimes      \_\_\_ Rarely      \_\_\_ Not rated

Comments:

9. What do you like most about working with this individual?

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10. In your opinion, what are his/her strongest abilities in relation to the job?

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11. Are there any areas in which you feel your co-worker could improve? If so, what are they and what type of improvement do you feel is necessary?

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## CO-WORKER INFORMATION FORM

[ORGANIZATION] is committed to developing and helping its employees grow and experience their full potential. To further this effort, we ask co-workers to provide input during the performance review process. The questions below are designed to solicit responses which will aid in providing a complete and accurate performance review. Your answers to these questions are important to us, and your responses will be held in the strictest confidence.

Employee being evaluated: \_\_\_\_\_

Position title: \_\_\_\_\_

Date of evaluation: \_\_\_\_\_

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- 
1. Describe the co-worker's interactions with customers, vendors, and other outside contacts.

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2. In your opinion, what are his/her strongest abilities in relation to the job?

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3. How does the co-worker interact with other employees?

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4. On a scale of 1 to 4 (1=low, 4=high), how would you rate the co-worker's enthusiasm for his/her job? Why?

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5. Are there any areas in which you feel the co-worker could improve? If so, what are they and what type of improvement do you feel is necessary?

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6. Overall, how well do you feel the co-worker performs his/her job duties and responsibilities?

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\_\_\_\_\_  
Signature of Employee Providing Response

\_\_\_\_\_  
Date

## SUPERVISOR INPUT FORM

[ORGANIZATION] is committed to developing and helping all its employees grow and develop their full potential. To further this effort, employees are asked to provide information regarding their supervisor's job performance. Your answers to these questions are important. If, for any reason, you feel you cannot answer a question or have no basis for comment, please check "Not Rated."

\_\_\_\_\_  
**Name of Supervisor**

\_\_\_\_\_  
**Date**

In working for this person, it appears that s/he:

1. Is technically competent and well-versed in his/her field of expertise; is able to provide counsel and advice when I have technical questions.

Consistently       Usually       Sometimes       Rarely       Not rated

Comments:

2. Keeps me informed about objectives and progress, and lets me know when plans are changed.

Often       Occasionally       Seldom       Not at All       Not rated

Comments:

3. Is a good teacher; explains and monitors expected standards of performance; provides direction to me on new tasks, projects, and priorities.

Consistently       Usually       Sometimes       Rarely       Not rated

Comments:

4. Effectively delegates workload, responsibility, and authority.

<input type="checkbox"/> Delegates work appropriately	<input type="checkbox"/> Gives me work assignments requiring work experience I do not yet have
<input type="checkbox"/> Gives me assignments that are not challenging enough	<input type="checkbox"/> Not rated

Comments:

5. Makes time to be accessible and available to discuss my suggestions, questions, or problems.

Consistently       Usually       Sometimes       Rarely       Not rated

Comments:

6. Is receptive to ideas and suggestions for new or different systems or approaches.

Very Receptive     Somewhat Receptive     Not Receptive     Not rated

Comments:

7. Is fair and consistent when dealing with staff members.

Consistently     Usually     Sometimes     Rarely     Not rated

Comments:

8. Gives me recognition for my contributions and efforts.

Often     Occasionally     Seldom     Not at All     Not rated

Comments:

9. Provides support and encouragement to me in areas I am working to improve or develop.

Very Supportive     Somewhat Supportive     Not Supportive Enough     Not rated

Comments:

10. Listens and understands me when we talk.

Listens intently     Is usually attentive

Often does not really hear what I am saying     Not rated

Comments:

11. Helps me to develop professionally by providing opportunities for growth and challenge.

Often     Occasionally     Seldom     Not at all     Not rated

Comments:

12. Sets a good example for staff members to follow.

\_\_\_ Consistently      \_\_\_ Usually      \_\_\_ Sometimes      \_\_\_ Rarely      \_\_\_ Not rated

Comments:

13. Treats me and others in a manner which creates a feeling of mutual respect.

\_\_\_ Consistently      \_\_\_ Usually      \_\_\_ Sometimes      \_\_\_ Rarely      \_\_\_ Not rated

Comments:

14. What do you like most about working with this individual?

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15. What suggestions do you have that you feel could improve your working relationship?

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16. Are there any areas in which you feel your supervisor could improve? If yes, what are they and what type of improvement do you feel is necessary?

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