

SAMPLE
[ORGANIZATION]
PERFORMANCE EVALUATION FORM

Statement of Policy

(ORGANIZATION) believes in regularly scheduled performance evaluations of employees. The evaluation will be a formal written document to assist the employee in his/her development and to provide the basis for compensation, promotion, transfer, and retention. This process assumes, and designates as a supervisory responsibility, that mutually agreed upon standards for performance will be set and used to evaluate employees. The overall evaluation will be conducted on a job-related basis, and will consider both supervisory observation and co-worker opinion.

It is the organization's responsibility to monitor employees' efforts continuously through communication and counseling, and the written appraisal must be consistent with such prior discussions.

The organization will maintain appropriate records of employee accomplishments and behavior to assure that the information incorporated into the appraisal is accurate, representative, and relevant to the entire evaluation period.

An employee's performance is confidential and guarded from inappropriate disclosure. Completed evaluation forms and their content should not be discussed outside authorized management channels. Employees should refrain from discussing appraisals, compensation, promotion, retention, or similar confidential data with other employees. Each employee must receive a copy of their completed evaluation for their own records.

Name: _____ Date: _____

Job Title: _____

Rate the employee on the job behaviors inside this form and circle the number corresponding to the most appropriate response:

- 1 - NEEDS IMMEDIATE IMPROVEMENT - 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.
- 2 - APPROACHING STANDARDS - Usually performs at or close to job requirements, however, needs supervision for complete and on time results. Could result from being new to the position.
- 3 - CONTRIBUTORY PERFORMANCE - Performance is what is expected of a fully qualified and competent person in the position. Sometimes performs with excellence, but not consistently.
- 4 - OUTSTANDING - Far exceeds normal expectations. Seldom equaled in overall contribution to [ORGANIZATION] and/or its programs.

The "prompts" shown next to the numerical ratings are meant to be a guide, and should not be used as strict or explicit statements.

EVALUATORS MUST ADD COMMENTS REGARDING EACH CRITERION TO EXPLAIN OR ILLUSTRATE THE JOB BEHAVIOR.

COMMUNICATION/TEMPERAMENT - Consider level of communication skills. Also consider ability to adjust skills to multitude of personalities and circumstances.

- 1 - Exhibits poor communication skills. Needs substantial improvement to be effective. Fails to notify others of critical issues or incidents. Has difficulty maintaining emotional balance.
- 2 - Communication requires effort. Is not comfortable with some interactions. Unsure when others should be notified of events. Retains even emotional keel in most circumstances.
- 3 - Effective in expressing and understanding ideas and instructions. Communicates clearly with staff, management, vendors, and customers. Maintains good behavior balance even when situation is difficult.
- 4 - Exceptional communication skills. Relates positively with everyone. Outstanding capacity to maintain sense of humor, perspective, and is a calming influence.

Comments:

ACCURACY/QUALITY - Consider correctness and thoroughness of work results when compared to established procedures and methods.

- 1 - Makes errors in judgment and work is inconsistent with desired quality.
- 2 - Usually accurate. Makes occasional mistakes.
- 3 - Requires little checking. Is exact, precise and complete most of the time.
- 4 - Requires virtually no checking. Accuracy and quality of work are a priority.

Comments:

LEARNING CAPABILITY - Consider speed with which new routines and explanations are understood, and the ability to retain new knowledge.

- 1 - Requires repeated and detailed instructions and explanations.
- 2 - Grasps instructions after explanation and opportunity to try out.
- 3 - Learns rapidly and retains instructions. Readily agreeable to change.
- 4 - Exceptionally fast to learn and adjust to changing conditions.

Comments:

ATTENDANCE - Consider faithfulness in coming to work daily, on time, and conforming to work hours.

- 1 - Lax in attendance and/or reporting for work on time.
- 2 - Usually present and on time.
- 3 - Promptness and attendance at standard.
- 4 - Exceptionally reliable in this area.

Comments:

INITIATIVE - Consider the tendency to contribute, develop, and/or carry out new ideas or methods.

- 1 - Rarely initiates or suggests new approaches. Prefers no change.
- 2 - Shows initiative occasionally. Needs to improve.
- 3 - Is resourceful, suggests or implements change and improvements.
- 4 - Frequently suggests new methods. Is very imaginative and creative. Acts on own initiative to accomplish assignments or identify work to be done.

Comments:

QUANTITY OF WORK - Consider the volume of work an individual does during a shift as compared to the volume of the whole job.

- 1 - Unable to keep pace with expected workload.
- 2 - Meets standards of output on some occasions, but not on consistent basis.
- 3 - Meets requirements of work expected.
- 4 - Usually completes more than expected without any sacrifice of quality.

Comments:

JOB KNOWLEDGE - Consider the depth and breadth of information concerning work duties, processes and [ORGANIZATION] procedures which are required for competent performance.

- 1 - Lacks understanding of many aspects. Makes little effort to upgrade self.
- 2 - Lacks knowledge of some procedures and/or duties. Makes an effort to improve.
- 3 - Has necessary knowledge level and works to keep it current.
- 4 - Has broad knowledge base of own job and (ORGANIZATION) as a whole. Takes advantage of every opportunity to improve self.

Comments:

SERVICE ORIENTATION - Consider relationship with staff, management, vendors, and customers.

- 1 - Does not demonstrate interest in others' needs, concerns, or work.
- 2 - Occasionally places operational tasks above others' needs or concerns. Needs to value people more highly.
- 3 - Interacts well with others. Acts effectively and cooperatively to solve problems in a timely fashion. Knows value of good service and positive interactions.
- 4 - Treats others as top priority. Clearly communicates their importance. Demonstrates effort to meet all requests and needs.

Comments:

COOPERATION/TEAMWORK - Consider willingness to assist others, contribute to harmony, and work toward common goals.

- 1 - Exhibits unwillingness to work with others. Not seen as a team player, can be obstacle to accomplishing goals.
- 2 - Prefers to work independently. Not quick to share information, resources, or efforts, but will when asked.
- 3 - Understands and supports concept of teamwork and is quick to volunteer to assist others.
- 4 - Exceptional at building work teams and consensus. Always has time and energy to give to others. Creates very harmonious work environment.

Comments:

MANAGING CHANGE/INNOVATION - Consider level of understanding why change is necessary and what will be required. Also consider ability to ask for input to clear up misunderstandings and to offer ideas on how to make change go as smoothly as possible.

- 1 - Unable to innovate or foster change.
- 2 - Some understanding of the change process. Often uncomfortable with cooperatively approaching change.
- 3 - Recognizes needed change and takes responsibility for an effective change and innovation process.
- 4 - Innovative thinking. Exceptional ability to foster positive climate of change.

Comments:

PLANNING/ORGANIZATION - Consider level of planning, organizing information, prioritizing tasks, and utilizing resources to meet needs; level of dependability in meeting deadlines.

- 1 - Crisis work style. No planning evident. Poor utilization of resources. Misses important deadlines.
- 2 - Deals with current situation only. Needs more planning to meet deadlines and handle multiple tasks.
- 3 - Not only thinks ahead, sees needs and reacts quickly to new priorities. Good at planning for future situations. Work is completed on time.
- 4 - Thinks strategically and is able to combine resources and information with exceptional skill to deal with current and future work. Efficiency and effectiveness at the highest level.

Comments:

SUPERVISING/MOTIVATING EMPLOYEES (if applicable) - Clearly tells others or employees what is expected and how their work will affect customers. Handles emotional behavior effectively. Gives recognition for positive results. Uses coaching and delegation to encourage improvement, takes corrective action when needed.

- 1 - Little effort expended to motivate or recognize people. Appears 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 and takes seriously the development of employees. Creates a good work environment.
- 4 - Creates a most positive and highly effective work environment. Exceptionally skilled at developing and motivating employees to give best effort.

Comments:

NARRATIVE SUMMARY

Overall Rating: Put an "X" where description most closely approximates this person's total impact on [ORGANIZATION]. Do not average; rather, consider the overall contribution.

- Falls below standards
- Approaching standards
- Contributory Performance
- Outstanding

Supervisor Signature

Date

Supervisor/Manager

Date

EMPLOYEE COMMENTS (use additional paper if necessary for full detail)

Your signature does not imply 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.

Employee Signature

Date

PLANNING FOR FUTURE PERFORMANCE (to be completed by both employee and supervisor during the appraisal discussion)

List mutually agreed upon specific areas which represent opportunities for improvement or growth in performance. Establish and list here specific objectives for achieving this improvement or

growth. Discuss the action steps to accomplish each objective. Include resources committed by the supervisor and/or [ORGANIZATION] to support this growth where applicable.

Targeted Areas	Objectives	Date of Achievement

What training, support, actions, or resources are necessary or desirable to complete the above performance plan or to build skills for the future?
