

Performance Planning and Appraisal

EMPLOYEE INFORMATION

Employee Name _____ Date ____/____/____

Department _____

Position _____

Purpose of Review

3 Months

6 Months

Annual

Other _____ Date ____/____/____

PROCEDURE

SECTION 1: PERFORMANCE APPRAISAL - describes ten professional criteria associated with job success or failure. Write the corresponding numerical value in the last column for each criterion. Add the numbers to obtain a total value. Check the rating that most closely indicates the level at which the individual has performed.

Transfer the total to the appropriate space at the bottom of the page. This will indicate and support your overall evaluation of the individual's performance.

SECTION 2: STRENGTHS AND DEVELOPMENT NEEDS - provides space for discussing overall job performance. Refer to Section 1 when completing this section.

SECTION 3: WORK PLAN FOR COMING REVIEW PERIOD - should reflect a mutually agreed-upon work plan for the coming review period. This section enables the supervisor and employee to develop a work plan for accomplishing the future objectives.

SECTION 4: EMPLOYEE COMMENTS AND SIGNATURES - is reserved for the individual's comments and signatures.

SECTION 1: PERFORMANCE APPRAISAL

PROFESSIONAL CRITERIA	Below Job Requirements	Achieved Job Requirements
	0	1
KNOWLEDGE Consider knowledge of skills, procedures, methods, equipment, and materials required to do the job.	Inadequate job knowledge. Understanding of the skills, procedures, and methods required for job is insufficient.	Understands and effectively completes normal job routine. Needs little additional instruction.
PRODUCTIVITY Consider the amount of work the individual produces during an extended period of time.	Works at extremely slow pace. Rarely meets deadlines. Needs constant follow up?	Works at a steady pace. Output definitely meets requirements. Occasionally completes work ahead of deadlines.
QUALITY Consider the accuracy and thoroughness of employee's work. Assess work results in terms of rejections, errors, and overall neatness.	Excessive errors and mistakes. Requires constant checking and rework.	Meets standards for accuracy and neatness. Makes some mistakes, but of a tolerable level. Needs normal supervision.
INITIATIVE Consider the degree to which employee is a self-starter, can work with minimum supervision, and seeks new and better methods to do the job.	Shows little initiative. Never volunteers. Must be told to do everything.	Voluntarily solves non-routine job problems when necessary. Effective worker.
COOPERATION Consider the effectiveness of the employee in accomplishing duties by working with others (for example, peers, supervisors, and customers).	Frequently is hostile and uncooperative when working with others to complete an assigned task. Attitude is unacceptable.	Generally cooperative. Willing to accept suggestions and direction. Acceptable relations with others.
DEPENDABILITY Consider the extent to which the employee can be relied upon to be available for work and to complete work properly.	Frequently undependable. Often fails to deliver a complete job. Leaves routine tasks incomplete.	Dependable. Can be relied on to complete all aspects of job. Needs normal supervision.
ORDERLINESS Consider the employee's ability to organize work and the work area.	Frequently disorganized with work area in disarray. Results in high degree of lost time and inefficiency.	Work is sufficiently organized to efficiently perform job.
ATTENDANCE Consider the employee's record of being at work regularly and on time.	Unacceptable attendance record. Continual lateness or absences from work.	Occasionally is absent or tardy. Reports absence or tardiness in advance.
COMMUNICATION Consider the employee's ability to effectively present ideas and information orally and/or in written form.	Unacceptable communication skills. Does not communicate message in a timely manner.	Generally communicates effective with coworkers, management, and clients.
JUDGMENT Consider the extent to which the employee makes good decisions.	Frequently exercises poor judgment.	Usually exercises good judgment.

Exceeded Job Requirements		INSERT NUMERIC VALUE
Performance exceeded the requirements of the job in several important areas.	Performance exceeded the requirements of the job in all major areas. Significant work above and beyond the responsibilities was achieved.	
2	3	0-3
Well informed. Completely understands all aspects of this job and related jobs.	An authority on own responsibilities. Knows why job functions are performed and how they relate with other jobs.	
Works fast. Produces more than most. Often work is completed ahead of deadlines.	Exceptional producer. Consistently completes work ahead of deadlines.	
Consistently high degree of accuracy and neatness. Work can be relied upon. Seldom needs supervision.	Consistently highest level of quality. Final output is virtually perfect.	
Seeks new tasks and responsibilities. Resourceful in familiar situations. Self-starter.	Goes out of way to accept responsibility. Highly resourceful and constructive in new situations. Creative and independent worker.	
Very cooperative. Usually shows consideration of others' viewpoints. Often offers assistance. Can be counted on to help.	Always works effectively with others. Shows a keen insight into people. Constantly offers and always is available to help others.	
Very dependable and persistent despite possible difficulties. Completes normal work and occasional special projects with little supervision.	Highly motivated and trustworthy. Can be counted on to go beyond limits of duties with little or no supervision when needed.	
Highly organized and efficient worker.	Exceptionally precise in organization of work. Has immediate access to anything needed. Extremely efficient.	
Seldom absent or tardy. Always reports absence or tardiness in advance.	Excellent attendance record. Always at work and on time.	
Effectively verbalizes thoughts to coworkers, management, and clients.	Excellent communicator. Effectively expresses thoughts in a verbal and written format.	
Regularly exercises good judgment. Able to think quick and logically under normal situations.	Excellent judgment. Can be counted on to think quickly and logically under pressure.	
OVERALL RATING DETERMINATION: Check appropriate box on basis of total points.		TOTAL POINTS

- | | |
|---|--------------|
| <input type="checkbox"/> Exceeded Job Requirements in all major areas | 27–30 Points |
| <input type="checkbox"/> Exceeded Job Requirements in several important areas | 17–26 Points |
| <input type="checkbox"/> Achieved Job Requirements | 9-16 Points |
| <input type="checkbox"/> Below Job Requirements | 0-8 Points |

SECTION 2: STRENGTHS AND DEVELOPMENT NEEDS

Cite outstanding accomplishments and describe employee's specific strong points.

Describe areas where the employee must improve or training is needed.

SECTION 3: WORK PLAN FOR COMING REVIEW PERIOD (if appropriate)

- A. List objectives or special projects (in priority) that have been assigned to the employee for the coming review period. State results or standards of performance and target dates mutually agreed upon. (Attach additional page if necessary.)

- B. Describe the action plan which will be used to achieve the objectives listed above (For example, what staff member, supervisor, or others will do and within what time frame).

SECTION 4: EMPLOYEE COMMENTS AND SIGNATURES

Employee Comments

Employee Signature _____ Date _____ / _____ / _____
(Signature does not imply agreement with contents)

Supervisor Signature _____ Date _____ / _____ / _____

Management Signature _____ Date _____ / _____ / _____