

Annual Performance Evaluation Form

From: _____ To: _____

Employee Name _____

Dept. _____

Supervisor _____

The performance review process is designed to provide an opportunity for joint performance planning, ongoing performance feedback and progress reviews, and a final year-end review. The key goals of the program are to:

- * Increase each employee's effectiveness in meeting the overall mission of the organization.
- * Ensure ongoing communication and feedback between the supervisor and employee.
- * Provide a formal basis for linking each employee's performance to the employee's pay.

PERFORMANCE FACTORS: Please or appropriate box

1. QUANTITY OF WORK: Workload and finished product in comparison to the expectations of the position.

OUTSTANDING <input type="checkbox"/>	EXCEEDS EXPECTATIONS/ COMMENDABLE <input type="checkbox"/>	MEETS EXPECTATIONS/ SATISFACTORY <input type="checkbox"/>	BELOW EXPECTATIONS/ IMPROVEMENT NEEDED <input type="checkbox"/>	UNACCEPTABLE/ UNSATISFACTORY <input type="checkbox"/>
<ul style="list-style-type: none"> • Produces an exceptionally high volume of work with speed and accuracy. Always does more than expected. 	<ul style="list-style-type: none"> • Consistently produces a high quantity of work. A thorough and careful worker. Uses good time management skills. 	<ul style="list-style-type: none"> • Produces an average volume of work, sometimes more. Works steadily, uses time effectively. 	<ul style="list-style-type: none"> • Production slightly below average. Needs to increase the volume of work produce. 	<ul style="list-style-type: none"> • Unsatisfactory producer. • Generates minimal volume of work and/or is inconsistent in level of production. Produces less than is expected or required.

Comments:

2. QUALITY OF WORK: Ability to provide neat, accurate and thorough quality of work at an appropriate level based on understanding gained through experience, education and training. Adherence to policies and procedures, including safety.

OUTSTANDING <input type="checkbox"/>	EXCEEDS EXPECTATIONS/ COMMENDABLE <input type="checkbox"/>	MEETS EXPECTATIONS/ SATISFACTORY <input type="checkbox"/>	BELOW EXPECTATIONS/ IMPROVEMENT NEEDED <input type="checkbox"/>	UNACCEPTABLE/ UNSATISFACTORY <input type="checkbox"/>
<ul style="list-style-type: none"> • Always produces exceptional quality of work. Has comprehensive understanding of all duties and procedures and overall impact to operation. 	<ul style="list-style-type: none"> • Seldom makes errors. Produces high quality work. Thorough understanding of duties and procedures. 	<ul style="list-style-type: none"> • Makes an acceptable level of errors. Quality of work meets standards. Has good working knowledge of duties and procedures. 	<ul style="list-style-type: none"> • Work often needs review. Makes more errors than should based on job knowledge. Slow to grasp details. 	<ul style="list-style-type: none"> • Excessive errors and repetitive mistakes are made. Fails to grasp most job assignments after sufficient training • Employee shows little concern with quality of work.

Comments:

3. DEPENDABILITY: The extent that the employee can be relied upon to complete work assignments well and on time; willingness to work when needed and conscientiousness with respect to attendance and punctuality

OUTSTANDING <input type="checkbox"/>	EXCEEDS EXPECTATIONS/ COMMENDABLE <input type="checkbox"/>	MEETS EXPECTATIONS/ SATISFACTORY <input type="checkbox"/>	BELOW EXPECTATIONS/ IMPROVEMENT NEEDED <input type="checkbox"/>	UNACCEPTABLE/ UNSATISFACTORY <input type="checkbox"/>
<ul style="list-style-type: none"> • Always does more than expected on assigned tasks and completes early with no supervision. 	<ul style="list-style-type: none"> • Consistently completes tasks early and results are beyond expectations with limited supervision. 	<ul style="list-style-type: none"> • Takes care of necessary tasks and completes within established timelines with minimal supervision. Regular and full-time attendance. 	<ul style="list-style-type: none"> • Usually completes tasks timely, sometimes requires prompting and supervision. Frequent absences and poor punctuality. 	<ul style="list-style-type: none"> • Often requires prompting to complete tasks. Requires close supervision. Very erratic attendance and tardiness problems.

Comments:

4. INITIATIVE: Competency to start and complete assignments without specific directions; recognize problems and apply or suggest viable solutions; engage in professional growth activities.

OUTSTANDING <input type="checkbox"/>	EXCEEDS EXPECTATIONS/ COMMENDABLE <input type="checkbox"/>	MEETS EXPECTATIONS/ SATISFACTORY <input type="checkbox"/>	BELOW EXPECTATIONS/ IMPROVEMENT NEEDED <input type="checkbox"/>	UNACCEPTABLE/ UNSATISFACTORY <input type="checkbox"/>
<ul style="list-style-type: none"> Continually identifies ways to improve job and department. Self- starter, seeks new duties, makes significant contributions to department. Displays initiative and enthusiasm during every day work 	<ul style="list-style-type: none"> Can zero in on the cause of problems and offer creative solutions. Displays strong analytical skills. Generally has clear understanding and accurate judgement; generally uses initiative, foresight, and discrimination in carrying out original ideas. 	<ul style="list-style-type: none"> Offers workable solutions to problems. Uses good judgment in solving problems and working with others. Displays common sense under routine job conditions; sometimes needs guidance to analyze and interpret non-routine job requirements. 	<ul style="list-style-type: none"> Needs to develop analytical skills necessary to weigh options and choose the best way to deal with situations. Spends too much time focusing on less important aspects of daily job. Seldom recognizes problems. Lacks foresight; not usually adaptable to change. 	<ul style="list-style-type: none"> Frequently comes to the wrong conclusions and assumes things. Ignores or misinterprets facts; poor discrimination in choosing course of action; does not grasp new ideas.

Comments:

5. ADAPTABILITY/VERSATILITY: Willingness to learn new tasks and adapt to change; establish priorities and handle various tasks simultaneously; ability to perform job under pressure or in critical situations.

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<ul style="list-style-type: none"> Adapts to new systems and processes well and seeks out training to enhance knowledge, skills and abilities. Always seems to know when to ask questions and when to seek guidance. 	<ul style="list-style-type: none"> Looks for ways to streamline procedures to improve efficiency and customer service. Sets priorities and adjusts them as needed when unexpected situations arise. 	<ul style="list-style-type: none"> Usually adjusts well to changes in the work place. Maintains good customer service relations, even under stress. 	<ul style="list-style-type: none"> Gets flustered in unusual situations. Does not always make the best decisions to fit the situation. 	<ul style="list-style-type: none"> Usually needs direct supervision, even for mundane and everyday tasks. Is not able to think independently or to deal with unexpected occurrences.

Comments:

6. ACCEPTANCE OF RESPONSIBILITY: Willingness to accept responsibility for tasks, including difficult or more complex tasks, personal actions and work assignments.

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<ul style="list-style-type: none"> Seeks additional responsibility and authority. Willing to assume responsible risk in taking action. 	<ul style="list-style-type: none"> Willingly accepts obligations. Employee requires only minimum follow-up. Sticks with problem to satisfactory conclusion. 	<ul style="list-style-type: none"> Generally accepts and meets responsibility without objections. Requires only general supervision. 	<ul style="list-style-type: none"> Reluctant to accept responsibility. Follow-up often required. 	<ul style="list-style-type: none"> Avoids responsibility. Needs constant supervision.

Comments:

7. ORGANIZATION: Prioritization, ability to anticipate conditions, work area organization, ability to locate materials and meet goals and objectives.

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<ul style="list-style-type: none"> Recognizes broad objectives clearly and arranges for most effective accomplishment. Exceptionally good planning and organizing skills. Conscientious. 	<ul style="list-style-type: none"> Plans workload effectively. Needs little guidance in coordinating major projects. Seeks assistance when needed. Usually carries out assignments conscientiously. 	<ul style="list-style-type: none"> Generally organized. Plans for many situations, usually seeks assistance when needed. May need direction on large projects or major changes. Occasionally requires assistance in prioritizing work. 	<ul style="list-style-type: none"> Sometimes unorganized, seldom seeks assistance when needed. May place too much emphasis on one part of a task or project. Frequently requires assistance in prioritizing work. 	<ul style="list-style-type: none"> Poorly organized. Tries to do everything alone. Tasks are often not accomplished. Unacceptable planning and organizing skills.

Comments:

8. WORKING RELATIONSHIPS: Ability and willingness to cooperate with associates, supervisors and subordinates to accomplish job requirements and meet the customer needs to ensure the success of the organization.

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<ul style="list-style-type: none"> Consistently promotes and maintains a harmonious/productive work environment. Is respected and trusted and often viewed as a role model. Stimulates teamwork and good attitude in others. Exceptional in dealing with public and associates. 	<ul style="list-style-type: none"> Frequently fosters teamwork, cooperation and positive work relationships. Works in harmony with others. Adaptable and tactful. Very effective in dealing with public and associates. Exercises discretion and tact. 	<ul style="list-style-type: none"> Usually interacts in a cooperative manner. Deals with conflict and frustration appropriately. Generally adapts self to persons and situations. Reasonably tactful and acceptable. Works well with others. 	<ul style="list-style-type: none"> Has difficulty in establishing satisfactory relationships with some people. Allows personal bias to affect job relationships. Requires reminders regarding needs and sensitivities of others. 	<ul style="list-style-type: none"> Not effective in working with others. Interpersonal relationships are counter-productive to work functions. Often antagonizes other people. Lacks tact. Poor attitude. Argumentative.

Comments:

9. COMMUNICATION SKILLS: Ability to effectively transmit ideas, thoughts, and information clearly and concisely to others in oral and written form in a professional manner.

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<ul style="list-style-type: none"> Outstanding ability to communicate ideas and thoughts to others. Conveys message using appropriate method of communication (email, memo, etc.) Consistently tailors communication style to the needs of each situation and audience. 	<ul style="list-style-type: none"> Tailors communication style to the needs of each situation and audience. Communicates in a clear and concise manner using appropriate grammar, spelling, punctuation and tone. Demonstrates professionalism through appropriate body language and nonverbal communication 	<ul style="list-style-type: none"> Usually organizes and expresses ideas and thoughts clearly and concisely, both orally and in writing. Write professionally with few grammar or punctuation errors. 	<ul style="list-style-type: none"> Rarely disseminates information, if at all. Fails to transmit information in a timely fashion. Frequently chooses inappropriate communication method. 	<ul style="list-style-type: none"> Written communications are unclear, disorganized, lack substance; contain grammatical and/or spelling errors. Rarely adjusts communication style; overlooks needs of different situations.

Comments:

10. SUPERVISION/LEADERSHIP SKILLS: Ability to plan, organize and control work activities, train, motivate and maintain morale; evaluate performance and communicates at all levels.

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<ul style="list-style-type: none"> • Exceptional ability to plan and control work activities. Respected by others and generates a high degree of cooperation. Exhibits a positive image and acts as a role model to others while improving morale. 	<ul style="list-style-type: none"> • Provides staff with innovative and constructive direction, delegation, feedback, monitoring and recognition. • Makes sound decisions • Maintains innovation, teamwork and inclusiveness. 	<ul style="list-style-type: none"> • Provides staff necessary direction, feedback, development and recognition. • Encourages innovation, teamwork and inclusiveness. • Uses good judgment in solving problems and maintaining a positive morale. 	<ul style="list-style-type: none"> • Has some difficulty in planning ahead, motivating and developing others. Usually behind schedule; poor role model. 	<ul style="list-style-type: none"> • Unable to plan, delegate, and organize effectively. Does not exhibit positive morale or motivation.

Comments:

General Comments on specific areas of achievement and/or areas needing improvement.

Recommended Action for Development and Goals for the next evaluation period:

PERFORMANCE REVIEW SUMMARY

Based on performance ratings above, indicate your overall evaluation of the employee during the appraisal period and indicate the reasons for the overall rating in the Comments section.

Overall Performance Rating: Outstanding Exceeded Expectations Meets Expectations Below Expectation Unacceptable

Comments:

EMPLOYEE COMMENTS

This section should be used to provide feedback to your supervisor on what can be done to assist you in performing your job. For example training or equipment needed, safety issues, improvements to policies or procedures necessary, etc. (You may attach a separate sheet and mark "See Attached" in this box)

SIGNATURES

EMPLOYEE:

I certify that this report has been discussed with me. I understand my signature does not necessarily indicate agreement. I understand that I may respond in writing to any aspect of this evaluation and that this response will be placed in my personnel file.

Signature

Title

Date

Supervisor's Signature

Date

Supervisor's Manager

Date