

## EMPLOYEE PERFORMANCE EVALUATION

NAME		POSITION/TITLE
HIRE DATE		LOCATION/DEPARTMENT
EMPLOYMENT STATUS FT      PT      PD	LAST REVIEW DATE	IMMEDIATE SUPERVISOR
DATE:	TYPE OF REVIEW: <input type="checkbox"/> ANNUAL <input type="checkbox"/> PROBATIONARY <input type="checkbox"/> OTHER	

### Instructions for Evaluators

Performance evaluations are conducted by the employee’s immediate supervisor at least once every 12 month period or as needed. The goal is to reach a mutual understanding of the standards of performance expected, and an overall performance rating. As the information recorded on this form will become part of the employee’s personnel record, and may be used in decisions concerning advancement, future training needs, performance-related salary adjustments or even disciplinary actions, take time to think through and complete all sections.

The performance evaluation process has been divided into two parts, one for the supervisor and one for the employee. Upon receipt of this package, give the employee the self-evaluation form to complete and at the same time schedule a performance meeting within two weeks. Then complete the supervisor’s section which has been divided into two sections: Major Job Elements and Performance/Customer Service Factors.

First, list and briefly describe the major elements (duties and responsibilities) of this employee’s position. Then, rate this employee’s performance of these major job elements and indicate with comments your justification for each rating. **YOU MUST MAKE A COMMENT WHENEVER YOU CHOOSE THE RATING “EXCEEDS EXPECTATIONS” OR “FAR BELOW EXPECTATIONS/UNSATISFACTORY”.** Next, rate this employee’s performance on the performance factors listed; again you must justify a high or low grade. Note: you may give a half grade if you feel the performance is between two rating levels. Finally, give an overall rating for this employee’s performance and sign the form.

After the review, please make two copies of the performance evaluation; one for your records, the other should be given to the employee. Return the original forms to the Human Resources Department.

**NAME** \_\_\_\_\_ **REVIEW DATE** \_\_\_\_\_

This self-evaluation will be of help to both you and your supervisor in reviewing your progress and in future planning. It provides an opportunity to compare your view, with that of your supervisor's, on your performance. After completing the evaluation questions (use additional paper if needed), share this form with your manager either during or prior to your performance evaluation meeting, as agreed upon.

1. List the two, three or four major duties or responsibilities in your job.

2. Do you think your job description accurately describes your job?

3. Describe your major performance accomplishments in the last year.

4. What have been your major disappointments with your performance in the last year?

5. What could your supervisor and/or the company do differently to help you better perform your job?

6. What are the personal development areas in which you most need to improve?

7. What other comments or suggestions should be addressed in this review?

## STANDARDS OF PERFORMANCE

Evaluate the employee's performance since the last appraisal. Place an "X" in the category which best describes the performance level for the factor being rated. Include supporting evidence for each factor. YOU MUST MAKE A COMMENT WHENEVER A GRADE OF "4" OR "1" IS CHOSEN.

4- EXCEEDS EXPECTATIONS	3- MEETS EXPECTATIONS	2- BELOW EXPECTATIONS/ NEEDS IMPROVEMENT	1- UNSATISFACTORY/ FAR BELOW EXPECTATIONS
Consistently achieves results superior to expectations.	Normally achieves expectations; occasionally exceeds requirements.	Work is below average, not of quality expected; requires improvements.	Unacceptable; considerable and immediate improvements are necessary.

I. MAJOR JOB ELEMENTS (See Job Description)	4 = Exceeds Expectations 3 = Meets Expectations	2 = Below Expectations 1 = Far Below Expectations/Unsatisfactory
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RATING: (Place "X" in box for appropriate rating)

1.	4	3	2	1
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COMMENTS:

Next period expectations:

- 
- 
- 

2.	4	3	2	1
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COMMENTS:

Next period expectations:

- 
- 
- 

3.	4	3	2	1
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COMMENTS:

Next period expectations:

- 
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-

<b>II. PERFORMANCE FACTORS</b>	4 = Exceeds Expectations 2 = Below Expectations 3 = Meets Expectations 1 = Far Below Expectations/Unsatisfactory				
<b>PROFESSIONALISM</b>	<b>COMMENTS &amp; FUTURE EXPECTATIONS</b>	4	3	2	1
<ul style="list-style-type: none"> <li>• The display of appropriate attitude, actions and work attire for the position;</li> <li>• Maintenance of own work area;</li> <li>• Flexibility;</li> <li>• Commitment to professional growth;</li> <li>• Responsibility for actions;</li> <li>• A skill level that inspires respect and confidence.</li> </ul>					
<b>DEPENDABILITY</b>	<b>COMMENTS &amp; FUTURE EXPECTATIONS</b>	4	3	2	1
<ul style="list-style-type: none"> <li>• The thoroughness demonstrated by the employee in following through on assignments and instructions in a reliable, trustworthy and timely manner;</li> <li>• Overall attendance and adherence to work schedules, office hours.</li> </ul>					
<b>JUDGEMENT/DECISION MAKING</b>	<b>COMMENTS &amp; FUTURE EXPECTATIONS</b>	4	3	2	1
<ul style="list-style-type: none"> <li>• The ability to think logically and practically before making decisions;</li> <li>• Use of independent thought, originality and reasoning;</li> <li>• Ability to prioritize work and timely implementation of workable solutions to problem;</li> <li>• The ability to handle confidential information.</li> </ul>					
<b>QUALITY OF WORK</b>	<b>COMMENTS &amp; FUTURE EXPECTATIONS</b>	4	3	2	1
<ul style="list-style-type: none"> <li>• The value of work produced by the employee and the thoroughness, accuracy, neatness and acceptability of the work completed;</li> <li>• Ability to work under pressure and learn from previous mistakes.</li> </ul>					
<b>INITIATIVE</b>	<b>COMMENTS &amp; FUTURE EXPECTATIONS</b>	4	3	2	1
<ul style="list-style-type: none"> <li>• Willingness to make significant contributions with little direction, voluntarily start projects, attempt non-routine jobs and tasks;</li> <li>• Energy, enthusiasm and ingenuity;</li> <li>• Judgment and independent actions within limits of authority;</li> <li>• Self starting and proactive.</li> </ul>					

<b>III. CUSTOMER SERVICE FACTORS</b>	4 = Exceeds Expectations 2 = Below Expectations 3 = Meets Expectations 1 = Far Below Expectations/Unsatisfactory				
<b>TEAMWORK</b>	<b>COMMENTS &amp; FUTURE EXPECTATIONS</b>	4	3	2	1
<ul style="list-style-type: none"> <li>• Contributes to a climate of strong morale and spirit where people strive to do their best</li> <li>• Notices when others are overwhelmed and pitches in</li> <li>• Celebrates wins and successes</li> <li>• Fosters open dialogue</li> <li>• Defines success in terms of the whole team</li> <li>• Fosters a feeling of belonging in the team</li> </ul>					
<b>CUSTOMER FOCUS</b>	<b>COMMENTS &amp; FUTURE EXPECTATIONS</b>	4	3	2	1
<ul style="list-style-type: none"> <li>• Is dedicated to exceeding the expectations and requirements of internal and external customers;</li> <li>• Gets first-hand customer information and uses it for improvements in products and services;</li> <li>• Establishes and maintains effective relationships with all customers and gains their trust and respect.</li> </ul>					
<b>CONFLICT MANAGEMENT</b>	<b>COMMENTS &amp; FUTURE EXPECTATIONS</b>	4	3	2	1
<ul style="list-style-type: none"> <li>• Steps up to conflicts, seeing them as opportunities</li> <li>• Reads situations quickly</li> <li>• Good at focused listening</li> <li>• Can hammer out tough agreements and settle disputes equitably</li> <li>• Can find common ground and get cooperation</li> </ul>					
<b>INTERPERSONAL SKILLS/RESPECT</b>	<b>COMMENTS &amp; FUTURE EXPECTATIONS</b>	4	3	2	1
<ul style="list-style-type: none"> <li>• Ability to express ideas clearly, concisely and effectively both orally and in writing;</li> <li>• Listens well, shares work related information, tolerant of others' work styles;</li> <li>• Ability to work with others in an assertive and effective manner;</li> <li>• The exercise of authority or the response to criticism in a tactful manner. Is easy to approach and talk to</li> <li>• Uses diplomacy and tact</li> <li>• Can diffuse even high-tension situations comfortably</li> </ul>					

<ul style="list-style-type: none"> <li>• Treats others respectfully</li> </ul>					
<b>III. CUSTOMER SERVICE FACTORS</b> <b>(Continued)</b>	4 = Exceeds Expectations 2 = Below Expectations 3 = Meets Expectations 1 = Far Below Expectations/Unsatisfactory				
CREATIVITY	COMMENTS & FUTURE EXPECTATIONS	4	3	2	1
<ul style="list-style-type: none"> <li>• Comes up with new and unique ideas</li> <li>• Tends to be seen as original and value-added in brainstorming settings</li> </ul>					
COMPASSION	COMMENTS & FUTURE EXPECTATIONS	4	3	2	1
<ul style="list-style-type: none"> <li>• Is tolerant with people and processes</li> <li>• Lets people know their opinions matter</li> <li>• Has patience</li> <li>• Demonstrates real empathy with the joys and pains of others</li> <li>• Is available and ready to help</li> </ul>					

**OVERALL RATING**

**MAJOR JOB ELEMENTS**

- 1.
- 2.
- 3.

4	3	2	1
4	3	2	1
4	3	2	1

**PERFORMANCE FACTORS**

- Professionalism
- Dependability
- Judgment / Decision Making
- Quality of Work
- Initiative

4	3	2	1
4	3	2	1
4	3	2	1
4	3	2	1
4	3	2	1

**CUSTOMER SERVICE FACTORS**

- Teamwork
- Customer Focus
- Conflict Management
- Interpersonal Skills/Respect
- Creativity
- Compassion

4	3	2	1
4	3	2	1
4	3	2	1
4	3	2	1
4	3	2	1
4	3	2	1

**Total Rating** \_\_\_\_\_

**Calculation of Raise**

Total rating \_\_\_\_\_ Divide by number of items rated \_\_\_\_\_ = \_\_\_\_\_ **% increase**  
 Effective Date \_\_\_\_\_

Please note 2006 range for salary increase = 0-4%. Any rating of 1.5 or below indicates no increase.

\_\_\_\_\_  
 Supervisor's Signature

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Next Level Supervisor/Manager

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Employee's Signature

\_\_\_\_\_  
 Date

Employee Comments:

## Review and Revision History

Revision Number	Authorized Signature(s)	Date	Description of change (If no changes, write N/A)
0	LLampidis	3/7/06	Initial version with revision number