

Sample Performance Appraisal

Employee Name: _____	Hire Date: _____
Employee Job Title: _____	Location: _____
Review Period Start: _____	Supervisor: _____
Review Period End: _____	Appraisal Date: _____

General Information

The purpose of the review is to determine objectively how well an employee is performing in his/her current position. The review is based upon a consideration of all the major functions a staff member performs.

Rating	Levels of Performance
5. Outstanding	Overall performance is outstanding. Consistently carries out responsibilities in an exceptional manner. Performance is approaching the level of the ideal or perfect employee.
4. Exceptional	Performance is very good and is above standard most of the time. Periodically exceeds expectations.
3. Meets Job Standards	Overall performance is satisfactory. Does good work most of the time and meets the requirements of the job.
2. Marginal	Overall performance does not meet job requirements. Periodically, performance is inconsistent and unacceptable in some areas.
1. Unsatisfactory	Overall performance is unsatisfactory. Consistently performs at an unacceptable level in most areas of performance.

The performance appraisal has two sections:

- **Section I** covers core responsibilities/duties (from current job descriptions).
- **Section II** covers the individual's actions that support the core responsibilities/duties.

You are to check the appropriate box for each line within the categories. Ratings are 1-5 or N/A if the category does not apply. Carry this total to page 9 and enter on the appropriate line.

In section II, the last performance elements, leadership and performance coaching, are worded to apply to supervisory positions. For non-supervisory staff, the entire category would be N/A (not applicable).

PERFORMANCE ELEMENTS

Section I

Core Responsibilities/Duties

(From job description, transfer each rating for these six areas to page 9)

	N/A	1	2	3	4	5
1. _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments:

Section II

Attendance & Punctuality

N/A	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Actions to consider for this topic:

- | | |
|--|---|
| <ul style="list-style-type: none">• Schedules time off in advance• Keeps absences within guidelines• Ensures work responsibilities are covered when absent | <ul style="list-style-type: none">• Begins working on time• Arrives at meetings and appointments on time |
|--|---|

Comments:

Communication

N/A	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Actions to consider for this topic:

- | | |
|--|---|
| <ul style="list-style-type: none">• Speaks clearly and persuasively• Responds well to questions• Edits work for spelling and grammar• Presents numerical data effectively | <ul style="list-style-type: none">• Listens and understands clarification• Writes clearly and informatively• Varies writing style to meet needs |
|--|---|

Comments:

Cooperation

N/A	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Actions to consider for this topic:

- | | |
|---|--|
| • Establishes and maintains effective relations | • Exhibits tact and consideration |
| • Offers assistance and support to co-workers | • Works cooperatively in group situations |
| • Responds to requests for service and assistance | • Confronts difficult situations maintaining objectivity |
| • Uses negotiation skills to resolve conflicts | • Encourages open communications |

Comments:

Customer Service

N/A	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Actions to consider for this topic:

- | | |
|--|--|
| • Displays courtesy and sensitivity | • Meets commitments |
| • Manages difficult or emotional customer situations | • Follows procedure to solve customer problems, improvises carefully |
| • Responds promptly to customer needs | • Always available for customers |
| • Handles service problems politely and efficiently | • Understands company requirements and standards |
| • Maintains pleasant and professional image | |

Comments:

Initiative

N/A	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Actions to consider for this topic:

- | | |
|--|--|
| <ul style="list-style-type: none">• Volunteers readily• Asks for help when needed• Strives to achieve organizational excellence• Follows instructions, responds to management direction | <ul style="list-style-type: none">• Seeks increased responsibilities• Responds to requests for assistance• Keeps commitments• Completes work in timely manner |
|--|--|

Comments:

Planning & Organization

N/A	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Actions to consider for this topic:

- | | |
|--|---|
| <ul style="list-style-type: none">• Selects and uses appropriate communication methods• Prioritizes and plans work activities• Sets goals and objectives• Manages competing demands• Adapts to changes in the work environment | <ul style="list-style-type: none">• Completes administrative tasks correctly and on time• Uses time effectively• Works in an organized manner• Follows policies and procedures |
|--|---|

Comments:

Quality

N/A	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Actions to consider for this topic:

- | | |
|---|--|
| • Demonstrates accuracy and thoroughness | • Looks for ways to improve work quality |
| • Applies feedback to improve performance | • Monitors own work to ensure quality |
| • Conserves organizational resources | • Takes responsibility for own actions |
| • Commits to doing the best job possible | • Meets productivity standards |

Comments:

Teamwork

N/A	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Actions to consider for this topic:

- | | |
|--|--|
| • Balances team and individual responsibilities | • Contributes to building a positive team spirit |
| • Gives and welcomes feedback | • Puts success of team above own interests |
| • Exhibits objectivity and openness to others' views | |

Comments:

Sales Skills

N/A	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Actions to consider for this topic:

- | | |
|---|---|
| <ul style="list-style-type: none">• Achieves sales goals• Overcomes objections with persuasion and persistence• Markets products to new customers effectively | <ul style="list-style-type: none">• Maintains existing business with customers• Maintains records and promptly submits information• Maintains customer satisfaction |
|---|---|

Comments:

Management Categories

Leadership

N/A	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Actions to consider for this topic:

- | | |
|---|---|
| <ul style="list-style-type: none">• Anticipates and resolves conflict, maintains objectivity• Turns team diversity into an advantage• Works for consensus, supports team decisions• Treats people with respect• Encourages training and development | <ul style="list-style-type: none">• Makes difficult decisions when a consensus cannot be reached• Defines processes and goals• Keeps individual and team work aligned with overall goals• Recognizes contributions |
|---|---|

Comments:

Performance Coaching

N/A	1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Actions to consider for this topic:

- | | |
|---|--|
| <ul style="list-style-type: none">• Defines responsibilities and expectations• Provides helpful, behaviorally specific feedback to others• Delegates and monitors work assignments• Is able to let others make decisions and take charge | <ul style="list-style-type: none">• Motivates for increased results• Regularly meets with staff to review their development progress• Matches the responsibility to the person |
|---|--|

Comments:

Performance Review Rating

Section I: Core Duties

Core Duty 1 _____
Core Duty 2 _____
Core Duty 3 _____
Core Duty 4 _____
Core Duty 5 _____
Core Duty 6 _____

Section I Total Points: _____ Divided by (6 - # of N/A's) equals **Section I** _____ **Rating**

Section II: Topic Areas

Attendance &
Punctuality _____
Communication _____
Cooperation _____
Customer Service _____
Initiative _____
Planning & Organization _____
Quality _____
Teamwork _____
Sales Skills _____

Management Topics

Leadership _____
Performance Coaching _____

Section II Total Points: _____ Divided by (11 - # of N/A's) equals **Section II** _____ **Rating**

Final Rating

Sum of Section I Rating and Section II Rating: _____
Divided by 2 equal _____ **final rating**

Final Rating Explanation

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Supervisor's Final Comments

Supervisor Signature

Date

Reviewed By: Signature

Date

Employee Comments

Employee Acknowledgment

I have reviewed this document and discussed the contents with my manager. My signature means that I have been advised of my performance status and does not necessarily imply that I agree with the evaluation. I also acknowledge that ABC is an "At-Will" Employer and this performance appraisal in no way affects that employment relationship. I have added my comments at the bottom of this page.

Employee Signature

Date