

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

Comments:

Section II

Attendance & Punctuality

N/A **1** **2** **3** **4** **5**

Actions to consider for this topic:

- Schedules time off in advance
- Keeps absences within guidelines
- Ensures work responsibilities are covered when absent
- Begins working on time
- Arrives at meetings and appointments on time

Comments:

Communication

N/A **1** **2** **3** **4** **5**

Actions to consider for this topic:

- Speaks clearly and persuasively
- Responds well to questions
- Edits work for spelling and grammar
- Presents numerical data effectively
- Listens and understands clarification
- Writes clearly and informatively
- Varies writing style to meet needs

Comments:

Cooperation

N/A 1 2 3 4 5

Actions to consider for this topic:

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

Comments:

Customer Service

N/A 1 2 3 4 5

Actions to consider for this topic:

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

Comments:

Initiative

N/A **1** **2** **3** **4** **5**

Actions to consider for this topic:

- Volunteers readily
- Asks for help when needed
- Strives to achieve organizational excellence
- Follows instructions, responds to management direction
- 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**

Actions to consider for this topic:

- 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
- 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"/>					

Actions to consider for this topic:

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

Comments:

Teamwork

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

Actions to consider for this topic:

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

Comments:

Sales Skills

N/A **1** **2** **3** **4** **5**

Actions to consider for this topic:

- Achieves sales goals
- Overcomes objections with persuasion and persistence
- Markets products to new customers effectively
- 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**

Actions to consider for this topic:

- 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
- 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**

Actions to consider for this topic:

- 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
- 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

Rating	Levels of Performance
5. Outstanding	Overall performance is outstanding. Consistently carries out responsibilities in an outstanding 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.

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