

Template – Job performance appraisal

When you conduct performance appraisals with individual employees, it is imperative to have a form to record their progress along with their goals for the future. That way you can track their progress from one appraisal meeting to the next. We've provided a sample appraisal form here. You could modify it to match the headings in your employee's job description.

PRIVATE AND CONFIDENTIAL

EMPLOYEE'S DETAILS

Name

Position

Years/months employed in this position

Date of this review

Date of next review

Reviewer (name and position title)

PROGRESS TOWARDS GOALS IDENTIFIED IN LAST PERFORMANCE REVIEW (IF APPLICABLE)

Goal	Action taken	Completed?	Comments
e.g. Obtain forklift licence	Enrolled in course	No	Became sick during course. Theory completed, practical exam will be taken in November.
Build new shelves in storeroom	Designed shelves, bought materials and assisted with construction	Yes	New shelves are great, finished well under budget.

EMPLOYEE COMMENTS AND OPPORTUNITY TO EVALUATE OWN PERFORMANCE

e.g. The cash drawer tends to slam shut unexpectedly, therefore I become nervous while using it. I'd be more comfortable if this problem was fixed ...

REVIEW THE MAJOR SKILLS REQUIRED TO FULFIL THIS POSITION'S DUTIES

Check the relevant boxes to indicate the employee's performance in each area. If additional tasks have been performed, ensure these are added here and also to the employee's job description if required.

Task description (taken from job description)	N/A	Poor	Satisfactory	Good	Excellent	Comments
e.g. Customer service – help customers				X		
Maintain stock levels					X	
Accept payment		X				Cash drawer often does not reconcile

Template – Job performance appraisal continued

GENERAL COMMENTS ABOUT THE EMPLOYEE'S PERFORMANCE

e.g.

Jane is well-presented, popular with other staff members and liked by customers. She tends to become flustered when using the cash register and, as a result, her cash drawer is often difficult to reconcile.

ACTION PLAN - GOALS FOR NEXT REVIEW PERIOD

Goal	Action required	Date for completion
e.g. <i>Complete forklift operator's course</i>	<i>Complete practical exam</i>	<i>November 2008</i>
<i>Improve cash handling skills so that cash drawer can be reconciled at least 80% of the time</i>	<i>Work with the payroll department for one week.</i>	<i>Improvement expected within one month of this review</i>

ADDITIONAL INFORMATION ABOUT THE ACTION PLAN OR GOALS FOR NEXT REVIEW PERIOD

ACKNOWLEDGEMENT OF PERFORMING APPRAISAL

Reviewer's signature

Employee's signature

Signatures indicate that everyone who participated in this review agreed that information and comments written here were true and correct.