



<<_CompanyName_>>

<<_Address1_>>

<<_Address2_>>

<<_City_>>, <<_StateProv_>> <<_PostalCode_>>

<<_Website_>>

PERFORMANCE APPRAISAL

Employee Name: [Click here and type name] **Hire Date:** [Click here and type hire date]
Employee Job Title: [Click here and type job title] **Department:** [Click here and type department]
Review Period Start: [Click here and type period start] **Supervisor:** [Click here and type supervisor name]
Review Period End: [Click here and type period end] **Appraisal Date:** [Click here and type appraisal date]

GENERAL INFORMATION:

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

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 or is performing at the 3 level of supervisor's appraisal
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 or Responsibilities List)
- **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 through 5 or N/A if the line does not apply. Total the points and divide by the number of lines in the Category **minus any N/As**. Then carry this total to page 7 and enter on the appropriate line.

In Section II, the last performance element, Leadership, is 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 8)

	N/A	1	2	3	4	5
1. [Click here and type core duty 1]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. [Click here and type core duty 2]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. [Click here and type core duty 3]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. [Click here and type core duty 4]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. [Click here and type core duty 5]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. [Click here and type core duty 6]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

COMMENTS

1. [Click here and type comment]
2. [Click here and type comment]
3. [Click here and type comment]
4. [Click here and type comment]
5. [Click here and type comment]
6. [Click here and type comment]

Section II:

3

BUSINESS ETHICS

	N/A	1	2	3	4	5
Keeps Commitments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inspires the trust of others	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maintains confidentiality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is accountable for all actions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shows respect & sensitivity for cultural differences	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Educates others on the value of diversity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Promotes a harassment-free environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Total points this section:

Rating¹:

COMMENTS

1. [Click here and type comment]
2. [Click here and type comment]

CHANGE MANAGEMENT

	N/A	1	2	3	4	5
Adapts to changes in the work environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Changes approach or method to best fit the situation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Meets challenges and difficult situations with resourcefulness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Identifies problems in a timely manner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Balances short and long-term goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Seeks out and accepts feedback to improve performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Total points this section:

Rating¹:

COMMENTS

1. [Click here and type comment]
2. [Click here and type comment]

¹ **Rating** is determined by adding all the scores and dividing it by the number of categories that are rated – N/A categories are not included in this dividend

COST CONSCIOUSNESS

	N / A	1	2	3	4	5
Works within approved budget	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conserves organizational assets and resources	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Develops and implements cost saving measures	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contributes to profits and revenue	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Total points this section:**Rating²:**

COMMENTS

1. [Click here and type comment]

2. [Click here and type comment]

MOTIVATION

	N / A	1	2	3	4	5
Volunteers readily	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Undertakes self-development activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Seeks increased responsibilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Takes independent actions and calculated risks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Asks for help when needed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Responds to requests for assistance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Strives to achieve organizational excellence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Total points this section:**Rating²:**

COMMENTS

1. [Click here and type comment]

2. [Click here and type comment]

² **Rating** is determined by adding all the scores and dividing it by the number of categories that are rated – N/A categories are not included in this dividend

PLANNING AND ORGANIZATION

	N/A	1	2	3	4	5
Selects and uses appropriate communication methods	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gathers and analyzes information skillfully	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prioritizes and plans work activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Uses time efficiently	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sets goals and objectives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Works in an organized manner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Total points this section:

Rating³:

COMMENTS

1. [Click here and type comment]
2. [Click here and type comment]

QUALITY

	N/A	1	2	3	4	5
Maintains objectivity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Demonstrates accuracy and thoroughness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Looks for ways to improve and promote quality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Displays commitment to excellence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Applies feedback to improve performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Remains current on latest quality requirements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Works in an organized manner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Total points this section:

Rating³:

COMMENTS

1. [Click here and type comment]
2. [Click here and type comment]

³ **Rating** is determined by adding all the scores and dividing it by the number of categories that are rated – N/A categories are not included in this dividend

TEAM

	N / A	1	2	3	4	5
Balances team and individual responsibilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Exhibits objectivity and is open to others' views	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Establishes and maintains effective relations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Offers assistance and support to co-workers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Works actively to resolve conflicts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Works well in group problem solving situations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conveys good and bad news to co-workers and customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Keeps individual and team's work aligned with overall goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Total points this section:**Rating⁴:**

COMMENTS

1. [Click here and type comment]
2. [Click here and type comment]

LEADERSHIP (SUPERVISORY STAFF ONLY)

	N / A	1	2	3	4	5
Anticipates and resolves conflict, maintains objectivity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Turns team diversity into an advantage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Defines processes and goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Works for consensus, supports team decisions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Makes the tough call when consensus cannot be reached	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Treats people with respect	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recognizes contributions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Encourages training and development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Total points this section:**Rating⁴:**

COMMENTS

1. [Click here and type comment]
2. [Click here and type comment]

⁴ **Rating** is determined by adding all the scores and dividing it by the number of categories that are rated – N/A categories are not included in this dividend

PERFORMANCE REVIEW SUMMARY

Core Duty 1:

Core Duty 2:

Core Duty 3:

Core Duty 4:

Core Duty 5:

Core Duty 6:

Section I Total Points:	Section Rating⁵
--------------------------------	-----------------------------------

Business Ethics

Change Management

Cost Consciousness

Motivation

Planning & Organization

Quality

Team

Leadership

Section II Total Points:	Section Rating⁵
---------------------------------	-----------------------------------

Overall Rating:

Section I and Section II Final Ratings added together	Final Rating⁶
--	---------------------------------

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 or is performing at the 3 level of employees supervisor's appraisal
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

⁵ **Section Rating** is determined by adding all the scores and dividing it by the number of categories that are rated – N/A categories are not included in this dividend

⁶ **Final Rating** is derived by adding the totals from Section I and II and dividing by 2

SUPERVISOR'S FINAL COMMENTS:

[Click here and type supervisor's comments]

Signature: _____

Date: [Click here and type date]

Reviewed By: Signature: _____

Date: [Click here and type date]

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 [Click here and type company name] is an "At-Will" Employer and this performance appraisal in no way affects that employment relationship.

Employee Signature: _____

Date: [Click here and type date]

EMPLOYEE COMMENTS:

[Click here and type employee comments]