



PERFORMANCE EVALUATION FORM

Introduction

Standardised Performance Management Processes

The performance evaluation form contained within this document is intended to help HR managers and line managers who lack a consistent and standardised performance management process. The specific requirements of every business will vary, but this evaluation form covers most areas that employees can be reviewed against. We recommend you read through the document and decide which areas are most relevant for your appraisals and adapt them where required.

Each section uses a three-score rating: Unacceptable; Meets expectations; and, Exceeds expectations. These ratings are designed to be simple and should act as the starting point for a discussion with the employee being reviewed.

A 2016 research paper from CIPD found that rating systems can suffer from bias, especially from those doing the rating and the managers themselves. Even though people think they are impartial, unconscious bias can often creep into evaluations. Giving training to line managers on how to conduct an appraisal in line with your company's expectations, and holding them accountable to their ratings, has been shown to reduce bias.

One way to help avoid bias in staff reviews is to ensure that there is clarity around expectations, especially when using an evaluation form such as this one. After all, how can anyone exceed expectations if it is not clear what is expected of them? Therefore, it is best practice to communicate precisely what is expected. This can be through setting quantifiable key performance indicators (KPIs) or, where a rating is based on behaviours, through the company values.

However you choose to use this document we encourage you to track ratings over time. Performance management should be motivational. It should improve productivity, help to develop your people, and **build a high-performance culture.**



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Original source

<https://opentextbc.ca/humanresourcesinfoodservices/back-matter/appendix-7-sample-performance-evaluation-form/>

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Employee

Job title

Department

Supervisor

Evaluation
period:

Part 1 – Introduction

This evaluation form lists the criteria and competencies against which you must rank the employee. Our company considers these performance factors to be critical to the success of personal, departmental, and company goals. The criteria listed in this evaluation should accurately reflect the employee's overall performance as it relates to the duties/expectations set forth in his or her job description.

Rate the employee in each section of this form according to the table below. Be sure to add comments, thoughts, and observations important to the evaluation process.

1 UNACCEPTABLE – Consistently fails to meet job duties and expectations; performs at a level demonstrably below corporate requirements; improvement required immediately to maintain employment.

2 MEETS EXPECTATIONS – Performs job duties at a satisfactory level according to job description under normal supervision and direction.

3 EXCEEDS EXPECTATIONS – Often exceeds job requirements; consistently meets goals and objectives; accomplishments occasionally made in areas outside normal job role.

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Part 2 – Job Criteria

Abilities, knowledge, and skills

The degree to which the employee exhibits the knowledge and skills required to fulfill job duties, as well as the techniques and tools used to do so.

Unacceptable

Meets Expectations

Exceeds Expectations

Comments:

Quality of Work

Does the employee complete his or her work with the expected degree of quality? Is the employee attentive to detail? Does the employee actively seek out and correct quality-control issues? Take into account accuracy of work, neatness, and adherence to standards.

Unacceptable

Meets Expectations

Exceeds Expectations

Comments:

Quantity of Work

Does the employee complete his or her fair share of the assigned work load? Are deadlines met consistently? Also consider how well the employee manages time, and how well he or she manages simultaneous or conflicting priorities.

Unacceptable

Meets Expectations

Exceeds Expectations

Comments:

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Attitude

Does the employee display a positive and cooperative attitude about the job role, assigned work, and the organisation? Are working relationships built and maintained by this employee? Is the employee open minded and accepting of constructive feedback by peers?

Unacceptable

Meets Expectations

Exceeds Expectations

Comments:

Communication Skills

Does the employee complete his or her work with the expected degree of quality? Is the employee attentive to detail? Does the employee actively seek out and correct quality-control issues? Take into account accuracy of work, neatness, and adherence to standards.

Unacceptable

Meets Expectations

Exceeds Expectations

Comments:

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Part 3 – Behavioural Characteristics

Cooperation

Does the employee work well with peers and supervisors? Does the employee willingly contribute to the success of the team or department? Does the employee exhibit consideration for others; a willingness to help; maintain a rapport with co-workers?

Unacceptable

Meets Expectations

Exceeds Expectations

Comments:

Reliability

Does the employee follow through on commitments and job duties consistently? Does the employee accept accountability for his or her work? Does the employee properly follow instructions, directives, and procedures?

Unacceptable

Meets Expectations

Exceeds Expectations

Comments:

Initiative

Does the employee actively seek out and assume additional responsibilities without being asked to do so? Does the employee demonstrate an ability to encourage and/or inspire others? Does the employee recognise and act upon new opportunities?

Unacceptable

Meets Expectations

Exceeds Expectations

Comments:

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Attendance and Punctuality

Consider how often the employee is late on assigned working days, leaves early on assigned working days, and is sick or absent, all within the context of organisational policies.

Unacceptable

Meets Expectations

Exceeds Expectations

Comments:

Judgment and Analysis

How well does the employee effectively analyze and solve problems? Does the employee clearly use sound judgment to do so? Is the employee decisive? Does the employee act on decisions in a timely manner? Does the employee successfully overcome obstacles?

Unacceptable

Meets Expectations

Exceeds Expectations

Comments:

Adaptability

How well does the employee adjust to new directives, procedures, duties, supervisors, or working environments? Does the employee accept new ideas with relative ease? Does the employee suggest new methods and approaches to work?

Unacceptable

Meets Expectations

Exceeds Expectations

Comments:

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Part 4 – Supervisory Criteria (if applicable)

Leadership

Does the employee consistently demonstrate an ability to lead others? Does the employee motivate others to perform better? Does the employee have the respect of his or her work group? Also consider the ability to direct others toward a common goal.

Unacceptable

Meets Expectations

Exceeds Expectations

Comments:

Organizational and Planning Abilities

How well does the employee plan and organise work duties? Does the employee coordinate well with other workers and departments? Does the employee establish priorities appropriately and anticipate future needs?

Unacceptable

Meets Expectations

Exceeds Expectations

Comments:

Task Delegation

How well does the employee oversee the work and direction of subordinates? Are duties assigned appropriately? Does the employee select the right kind of staff as appropriate to the task at hand?

Unacceptable

Meets Expectations

Exceeds Expectations

Comments:

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Part 5 – Objective Completion

Objectives for Review Period

List and discuss the objectives set forth for this employee during the period under review. Identify those areas of responsibility where the employee did/did not meet performance objectives and/or project milestones. Evaluate the progress made by the employee on predetermined objectives, projects, job duties, and special assignments by selecting the appropriate box below each goal listed.

Objective #1

Satisfactory progress

Unsatisfactory progress

Objective #2

Satisfactory progress

Unsatisfactory progress

Objective #3

Satisfactory progress

Unsatisfactory progress

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Objectives for Next Review Period

List any goals, projects, job duties, and special assignments to be continued and/or completed in the coming year. Set these goals with the understanding that corporate priorities are subject to change as business situations change. Update this section as necessary throughout the next review period.

Objective #1

Objective #2

Objective #3

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Part VI – Overall Performance

Overall Assessment

Use this space to specify the employee's overall job performance. The overall rating should reflect and take into account job criteria, behavioural, supervisory, and goal completion rankings.

Unacceptable

Meets Expectations

Exceeds Expectations

Comments:

Development/Training Objectives

Complete this section once you and the employee have discussed and agreed upon opportunities for improvement of the employee's performance/skills. Include training (either formal or informal) and/or developmental objectives, corresponding activities, and time frames for completion.

Developmental/Training Objective #1

Developmental/Training Objective #2

Sign-off

I have been advised of my performance rankings. The rankings and comments in this review have been discussed and explained to me by my supervisor. My own comments are as follows:

Employee Signature:

Date:

Supervisor Signature:

Date:



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