**Performance Appraisal Form (sample)**

*Shaded area to be filled in by general manager in consultation with business administrator.*

*The rest of the form is filled in by the employee in preparation for the annual performance appraisal and brought to the interview.*

*The Key Results Areas and Performance Expectations are filled out just prior to the start of the fiscal year.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | | **Position** | |
| **Appraiser** | | **Date of Appraisal** | |
| **Appraisal Period** | | **Employee Anniversary Date** | |
| **Status: Overtime** | **Status: Sick Days** | | **Status: Vacation Days** |

Prior to, or within the first month of, the fiscal year, list major duties and performance expectations in the space below. At the completion of the year, and in preparation for the performance appraisal interview, rate your accomplishment of these duties according to the following scale:

1 – exceptional 2 – exceeds expectations 3 – meets expectations 4 – improvement required 5 – unacceptable

|  |  |  |  |
| --- | --- | --- | --- |
| **Key Result Area**  (to be entered *prior* to fiscal year) | **Performance Expectations**  (to be entered *prior* to fiscal year) | **Performance Evaluation**  (to be entered at *end of* fiscal year) | |
| Rating | Comments |
| 1. |  |  |  |
| 2. |  |  |  |
| 3. |  |  |  |
| 4. |  |  |  |

**Rate the following according to your perception of how well you are doing:**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Self | Eval | ATTITUDE-APPLICATION TO WORK | Self | Eval | ABILITY TO LEARN |
|  |  | Outstanding in Enthusiasm |  |  | Learns work exceptionally well |
|  |  | Very interested & industrious |  |  | Learns work readily |
|  |  | Average in diligence & interest |  |  | Average in understanding work |
|  |  | Somewhat indifferent |  |  | Rather slow in learning |
|  |  | Definitely not interested |  |  | Very slow to learn |
|  |  |  |  |  |  |
|  |  | COMMENTS & SPECIFIC EXAMPLES |  |  | COMMENTS & SPECIFIC EXAMPLES |
|  |  |  |  |  |  |
| Self | Eval | INITIATIVE | Self | Eval | QUALITY OF WORK |
|  |  | Self-starter – seeks work |  |  | Excellent |
|  |  | Goes ahead independently at times |  |  | Very Good |
|  |  | Does all assigned work |  |  | Average |
|  |  | Hesitates |  |  | Below Average |
|  |  | Lacks motivation |  |  | Very Poor |
|  |  | COMMENTS & SPECIFIC EXAMPLES |  |  | COMMENTS & SPECIFIC EXAMPLES |
|  |  |  |  |  |  |
| Self | Eval | SENSE OF RESPONSIBILITY | Self | Eval | QUANTITY OF WORK |
|  |  | Exceptionally Responsible |  |  | Unusually high output |
|  |  | More responsible than average |  |  | More than average |
|  |  | Average |  |  | Normal output |
|  |  | Rarely accepts responsibility |  |  | Below average |
|  |  |  |  |  | Low out-put, slow |
|  |  | COMMENTS & SPECIFIC EXAMPLES |  |  | COMMENTS & SPECIFIC EXAMPLES |
|  |  |  |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Self | Eval | **JUDGEMENT** | Self | Eval | **TECHNICAL PROFICIENCY** |
|  |  | Exceptionally Mature in judgement |  |  | Very Good |
|  |  | Above average in making decisions |  |  | Satisfactory |
|  |  | Usually makes the right decision |  |  | Needs improvement |
|  |  | Consistently uses bad judgement |  |  |  |
|  |  | **COMMENTS & SPECIFIC EXAMPLES** |  |  | **COMMENTS & SPECIFIC EXAMPLES** |
|  |  |  |  |  |  |
| Self | Eval | **RELATIONS WITH OTHERS** | Self | Eval | **COMMUNICATION SKILLS** |
|  |  | Exceptionally well accepted | A | A | A. ORAL |
|  |  | Works well with others |  |  | Very Good |
|  |  | Gets along satisfactorily |  |  | Satisfactory |
|  |  | Has difficulty working with others |  |  | Needs improvement |
|  |  | Works very poorly with others |  |  |  |
|  |  | **COMMENTS & SPECIFIC EXAMPLES** |  |  | **COMMENTS & SPECIFIC EXAMPLES** |
|  |  |  |  |  |  |
| Self | Eval | **ATTENDANCE** | Self | Eval | **PUNCTUALITY** |
|  |  | Regular |  |  | Regular |
|  |  | Irregular |  |  | Irregular |
|  |  | **COMMENTS & SPECIFIC EXAMPLES** |  |  | **COMMENTS & SPECIFIC EXAMPLES** |
|  |  |  |  |  |  |
| Self | Eval | **ORGANIZATION & PLANNING** | Self | Eval | \*\*\* **OVERALL EVALUATION** \*\*\* |
|  |  | Excellent ability to manage time & schedule tasks |  |  | Exceptional |
|  |  | Adequate |  |  | Exceeds expectations |
|  |  | Disorganized: Fails to plan |  |  | Meets Expectations |
|  |  |  |  |  | Improvement required |
|  |  |  |  |  | Unacceptable |
|  |  | **COMMENTS & SPECIFIC EXAMPLES** |  |  | **ADDITIONAL COMMENTS** |
|  |  |  |  |  |  |

**EMPLOYEE NARRATIVE COMMENTARY**

1. In which areas of performance do you feel you do best?
2. In which areas of performance do you feel there is a need for improvement?
3. What obstacles have hindered your performance?
4. Do you have any specific career goals or objectives for self-development?
5. What duties give you the most satisfaction?
6. Are there any other areas you wish to discuss or comment on?

###### Recommend for merit increment if eligible: Yes \_\_\_\_\_\_\_ No \_\_\_\_\_\_\_

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**Employee’s Signature Supervisor’s Signature**

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