



PERFORMANCE APPRAISAL / MANAGEMENT

CLIENT NAME _____ DATE _____

EMPLOYEE NAME _____ SS # _____

DATE OF HIRE _____ LAST REVIEW DATE _____

DEPARTMENT _____ POSITION _____

APPRAISAL ACTION Annual Promotion Other

Definition of Ratings:

- 5 = Excellent Consistently exceeds the requirement of the element. Little coaching needed.
- 4 = Good Consistently meets the requirements of the element. Little supervision needed.
- 3 = Average Often meets the requirements of the element. Normal supervision required.
- 2 = Marginal Often fails to meet the requirements of the element. Supervision required.
- 1 = Unsatisfactory Never meets the requirements of the element. Constant supervision required.
- N/A Not Applicable Category does not apply

PERFORMANCE ELEMENT	RATING	REVIEWER COMMENTS
Job Knowledge: Knowledge of products, policies and procedures.		
Skills Proficiency: Demonstrated knowledge and ability use tools / technology.		
Productivity: Goals are achieved within established timelines. Work is accomplished accurately.		
Control of Operation: Monitors, evaluates and correct performance of self and others.		
Planning: Sets realistic goals and utilizes time / resources wisely. Anticipates changes.		
Cost Control: Operates within or below budget. Manages and uses resources wisely.		
Communication: Effective oral and written skills. Ability to express thoughts / ideas.		
Organization: Ability to structure tasks and establish priorities.		
Reliability: Trustworthy and persistent. Strives to accomplish goals.		
Initiative: Displays independent thinking and drive. Anticipates needs.		
Decision Making: Uses logical and sound judgment. Focuses on facts.		
Leadership: Ability to take charge. Coaches, motivates, and develops others. Serves as role model.		
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PERFORMANCE ELEMENT	RATING	REVIEWER COMMENTS
Teamwork: Willingness to work harmoniously with others. Responds positively.		
Attendance: Demonstrates adherence to company standards and policy.		
Company Values: Exhibits understanding of values. Communicates them with others.		
Key Responsibility		
Key Responsibility		
Key Responsibility		

ON A SEPARATE PAPER, ADD ADDITIONAL KEY RESPONSIBILITIES AS NEEDED.

OVERALL RATING

- 5** Exceptional performance that far exceeds the established requirements.
- 4** Above average performance frequently exceeding the established requirements.
- 3** Competent and satisfactorily meeting requirements.
- 2** Does not adequately accomplish the established requirements.
- 1** Requires immediate improvement.

DEVELOPMENTAL ACTION PLAN *(Attach additional sheets as needed)*

1. _____
2. _____
3. _____

REVIEWER COMMENTS

EMPLOYEE COMMENTS

ACKNOWLEDGEMENT

This evaluation has been discussed with me. I understand that my signature does not necessarily indicate agreement with this evaluation. I have made my disagreement, if any, known by written notice. I further understand that failure to improved required elements may result in immediate termination of my employment.

EMPLOYEE SIGNATURE _____ **DATE** _____

PRINT NAME _____