

Employee Name: _____
Supervisor: _____
Review Period: _____

Title: _____
Reviewer: _____

SCOPE:

The purpose of the Performance Evaluation and Development Plan is to clarify expectations, set objectives and identify actions to maintain or increase employee effectiveness.

PERFORMANCE RATING SCALE:

Rating	Class	Class Definitions
5	Exceptional Performance	Demonstrates a level of performance that consistently exceeds the normal requirements of the job. Always looks to perform additional duties and routinely demonstrates initiative in his or her job.
4	Highly Effective	Demonstrates a level of performance that at times goes beyond the normal requirements of the job. Periodically demonstrates initiative and looks to take on additional duties in his or her job.
3	Solid Performer	Demonstrates a level of performance that consistently meets the requirements of the position.
2	Improvement Needed	Demonstrates a level of performance that does not meet job requirements indicating a need for improvement. Requires significant improvement in several aspects of the job.
1	Unacceptable Performance	Demonstrates a level of performance that is clearly below the standards expected in the job. A clearly defined plan for development must be completed in order to address the performance.

RESPONSIBILITIES:

Summarize major responsibilities and specific objectives:

RESULTS:

Describe specific accomplishments since the last review and as compared to established objectives:

PERFORMANCE FACTORS CHART:

Criteria	Description	Comments	Rating
Quality of Work	Accuracy, thoroughness and degree of care in work performed Adherence to established standards and policies		
Productivity	Amount or degree of work consistently achieved, as job assignment requires		
Attendance	Arrives and leaves according to established expectations. Provides notice when time off is needed in accordance with all applicable policies.		
Planning and Organization	Assess needs on an ongoing basis Sets priorities & develops a plan of action Uses resources effectively Meets deadlines		
Judgment and Decision Making	Maintains company & client confidentiality Identifies problems, causes & resolutions Act on/Implements decisions and evaluates outcome Makes sound & timely decisions/recommendations based on all factors and/or standards of practice		
Initiative and Reliability	Willingness to assume responsibility Ability to take prompt and proper action within scope of authority Planning of constructive ideas Degree of supervision/direction required		
Adaptability	Degree of flexibility and openness to change Acceptance and utilization of constructive criticism		
Leadership	Communicates skillfully with work group and other departments Demonstrates ability to achieve results by managing other and through personal example Ability to inspire in others a willingness and desire towards a common objective		
Communication	Ability to effectively express ideas and concepts, both verbal and written		
Teamwork	Work co-operatively with others and consider their ideas Establishes and maintains productive work relationships with all employees and clients		

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PERFORMANCE SUMMARY/GENERAL OVERALL PERFORMANCE:

Tally and score the employee's overall performance from the Performance Factors Chart above.

Rating	Class	Totals
5	Exceptional Performance	
4	Highly Effective	
3	Solid Performer	
2	Improvement Needed	
1	Unacceptable Performance	

Give a summary and explanation considering indicators such as responsibility, results and performance factors in the comments below.

COMMENTS:

Reviewers Comments:

Employee Comments:

DEVELOPMENT PLAN AND OBJECTIVES FOR THE COMING QUARTER:

Establish a development plan and objectives with the employee for the coming quarter. The plan should include specific actions and training the employee can take to maintain or increase effectiveness and are the basis for the next performance evaluation.

Development Plan:

MAJOR OBJECTIVES FOR THE NEXT QUARTER/TWO QUARTERS/YEAR:

Establish a major objective plan with the employee for the coming quarter. The objectives should include specific actions, plans, processes, procedures, training etc. The major objectives are what the employee intends to achieve and are the basis for the next performance evaluation.

Objectives:

ACKNOWLEDGMENT:

Reviewer Signature: _____

Date: _____

*Employee Signature: _____

Date: _____

**My signature indicates that my manager and I have discussed this evaluation.*

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