



PERFORMANCE APPRAISAL

Any of the following three methods may be used to appraise your employee's performance during this past time period. If you are recommending a salary increase, you will need to complete a Human Resources Change Report indicating the employee's name, employee number, department, title, current date, effective date, current rate (from), the new rate (to), and the next review date. This form **must be countersigned by your supervisor before being discussed with your subordinate.**

1. APPRAISAL/SELF-APPRAISAL

In sufficient time to be completed prior to the scheduled review date you may request your employee to appraise his/her own performance in a narrative (memorandum) format for the specified time period. He/she should address his/her accomplishments and shortcomings. Goals for the next appraisal period should also be prepared. Concurrently, you would prepare the same type of appraisal, meet with **your** supervisor and secure his/her approval of the appraisal you have prepared. If you have recommended a salary increase, the Human Resources Change Report must also be countersigned. After necessary approvals have been secured and both you and your subordinate have completed your appraisal/self-appraisal, adequate time should be set aside to discuss the material with your subordinate.

2. JOB DESCRIPTION OR GOALS/OBJECTIVES BASED APPRAISAL

In sufficient time to be completed prior to the scheduled review date you may wish to appraise your employee's performance for the specified time period based on how he/she has accomplished the responsibilities in his/her job description or against goals/objectives that were previously agreed upon. This appraisal may take a narrative (memorandum) format. At the same time the responsibilities are appraised, new responsibilities (goals) should be outlined. The job description may also need to be updated. You will then need to meet with **your** supervisor and secure his/her approval of the appraisal you have prepared. If you have recommended a salary increase the Human Resources Change Report must also be countersigned. After the necessary approvals have been secured, adequate time should be set aside to discuss this material with your subordinate.

3. APPRAISAL FORM

In those situations where the above procedures may not be appropriate, an evaluation form is contained on pages 2 and 3 of this document. In sufficient time to be completed prior to the scheduled review date, you may wish to utilize this form. Please appraise **ONLY THOSE FACTORS RELEVANT TO THE JOB BEING PERFORMED**. You may also wish to provide your employee with a copy of this form to appraise himself/herself. Your subordinate's self-appraisal may provide the basis for a better discussion of his/her performance. When you have completed your appraisal, you will need to meet with **your** supervisor and secure his/her approval of the appraisal you have prepared. If you have recommended a salary increase the Human Resources Change Report must also be countersigned. After the necessary approval have been secured, adequate time should be set aside to discuss this appraisal material with your subordinate.

No matter which method you choose, after the discussion, both you and your employee need to sign and date the appraisal instrument (memorandum or form). Your employee's signature indicates only that they have reviewed the material; not that they agree. Your employee is free to include his/her written comments on the appraisal.

The documentation of past accomplishments, shortcomings and future goals is important, but not nearly as important as the sharing of information between a supervisor and his/her subordinate.

Date _____

Name _____ Position Title _____

This appraisal covers the period from _____ to _____

JOB KNOWLEDGE: Grasp of information, responsibilities, procedures, equipment and techniques required to do the job.

- | | | | |
|--|---|---|---|
| <input type="checkbox"/> Handicapped often due to lack of knowledge/info/understanding | <input type="checkbox"/> Has not acquired acceptable level of knowledge/info required | <input type="checkbox"/> Has adequate knowledge/info to do a satisfactory job | <input type="checkbox"/> Has more job related information than expected for this position |
|--|---|---|---|

COMMENTS/GOALS

QUALITY OF WORK: Accuracy, thoroughness, orderliness, and acceptability of work completed.

- | | | | |
|--|---|---|---|
| <input type="checkbox"/> Errors/omissions are frequent and serious | <input type="checkbox"/> Sometimes imprecise or incorrect | <input type="checkbox"/> Acceptable for employee(s) in this position (contains minimum of errors) | <input type="checkbox"/> Consistently thorough and accurate (seldom makes errors) |
|--|---|---|---|

COMMENTS/GOALS

PRODUCTIVITY: Volume of work accomplished.

- | | | | |
|--|--|--|---|
| <input type="checkbox"/> Output of work inadequate to meet requirements of job | <input type="checkbox"/> Not quite as productive as expected in this job | <input type="checkbox"/> Output of work is sufficient for job requirements | <input type="checkbox"/> Consistently turns out more work than expected |
|--|--|--|---|

COMMENTS/GOALS

DEPENDABILITY: Conscientiousness with which the employee carries out tasks; completely, competently and punctually.

- | | | | |
|--|--|--|---|
| <input type="checkbox"/> Fails to follow instructions, meet commitments or complete work on time | <input type="checkbox"/> Needs more than normal supervision to comply with instructions, deadlines, etc. | <input type="checkbox"/> Fulfills commitments, meets deadlines/produces work with normal supervision | <input type="checkbox"/> Completes each task, meets deadlines, etc. with minimum of supervision |
|--|--|--|---|

COMMENTS/GOALS

PLANNING & ORGANIZING: Ability to use working time constructively and productively.

- | | | | |
|---|---|---|--|
| <input type="checkbox"/> Does not follow routine methods systematically | <input type="checkbox"/> Adequately performs routine work, but does not plan other work efficiently | <input type="checkbox"/> Is reasonably effective, occasionally needs assistance organizing work | <input type="checkbox"/> Plans work so as to use time effectively more than satisfies job requirements |
|---|---|---|--|

COMMENTS/GOALS

COMMUNICATIONS: Ability to communicate with others in a written or verbal medium.

WRITTEN:

- | | | | |
|--|---|--|--|
| <input type="checkbox"/> Unable to translate ideas/thoughts to written words | <input type="checkbox"/> Has difficulty conveying ideas/thoughts in writing | <input type="checkbox"/> Able to convey ideas! thoughts in writing | <input type="checkbox"/> Consistently able to concisely convey ideas/thoughts in writing |
|--|---|--|--|

VERBAL:

- | | | | |
|---|--|--|--|
| <input type="checkbox"/> Unable to verbalize ideas/thoughts | <input type="checkbox"/> Has difficulty verbalizing ideas/thoughts | <input type="checkbox"/> Able to convey ideas! thoughts orally | <input type="checkbox"/> Consistently able to concisely convey ideas/thoughts orally |
|---|--|--|--|

COMMENTS/GOALS

ATTENDANCE & PUNCTUALITY: Overall attendance/promptness including reporting to work and respect for breaks.

- | | | |
|--|--|--|
| <input type="checkbox"/> Often late for work (abuses leave privileges/breaks more than most) | <input type="checkbox"/> Sometimes late (takes unusual breaks, requests leave in advance, but has no concern for workload) | <input type="checkbox"/> Seldom late (considerate of staff in planning leave and breaks) |
|--|--|--|

COMMENTS/GOALS

APPRAISE THE FOLLOWING FACTORS ONLY IF THEY RELATE TO THE JOB BEING PERFORMED.

JUDGEMENT: Ability to reason, interpret and use discretion in carrying out assignments.

- Unable to analyze facts/ reach logical conclusions Has difficulty analyzing situations/arriving at sound conclusions Usually tends to be logical its approach to problems Consistently logical (considers facts, weighs alternatives, etc.)

COMMENTS/GOALS

COOPERATION: Ability to communicate interact and deal effectively with supervisor, subordinates, other employees and members/clients/public.

- Problem working with others in office or outside contacts Occasionally has problems in working with others No problem working with others (has good relations and is cooperative) Cooperative, tolerant, able to work with others to accomplish tasks

COMMENTS/GOALS

INITIATIVE: Energy and motivation in identifying, starting and completing tasks.

- Fails to start or complete required tasks Needs frequent encouragement to start or complete required tasks Does not shirk duties, but does not pursue additional responsibilities Cheerfully completes job without coaching

COMMENTS/GOALS

RESOURCEFULNESS: Ability to resolve unusual situations.

- Has difficulty without specific guidance Relies on others to solve problems Adequately deals with unusual problems Displays creativity and imagination in the absence of guidelines and rules

COMMENTS/GOALS

ACCEPTANCE OF RESPONSIBILITY: Willingness to accept delegated duties.

- Generally seeks to avoid responsibility Reluctant to accept responsibility and does so only within well defined limits Accepts and performs delegated duties willingly More willing than others to assume additional duties

COMMENTS/GOALS

APPEARANCE: Grooming, cleanliness, and appropriateness of dress on the job.

- Often inappropriate dress and grooming Meets dress and grooming standards

COMMENTS/GOALS

ADDITIONAL COMMENTS/GOALS

EMPLOYEE COMMENTS

My signature below indicates only that this appraisal was discussed with me on _____ (Date)

Employee Signature

Supervisors Signature