Sample Performance Appraisal

Employee Name: ___________________________ Hire Date: ____________________

Employee Job Title: ___________________________ Location: ____________________

Review Period Start: ___________________________ Supervisor: ____________________

Review Period End: ___________________________ Appraisal Date: ____________________

General Information
The purpose of the review is to determine objectively how well an employee is performing in his/her current position. The review is based upon a consideration of all the major functions a staff member performs.

<table>
<thead>
<tr>
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</tr>
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</table>
The performance appraisal has two sections:

- **Section I** covers core responsibilities/duties (from current job descriptions).
- **Section II** covers the individual's actions that support the core responsibilities/duties.

You are to check the appropriate box for each line within the categories. Ratings are 1-5 or N/A if the category does not apply. Carry this total to page 9 and enter on the appropriate line.

In section II, the last performance elements, leadership and performance coaching, are worded to apply to supervisory positions. For non-supervisory staff, the entire category would be N/A (not applicable).
PERFORMANCE ELEMENTS

Section I

Core Responsibilities/Duties
(From job description, transfer each rating for these six areas to page 9)

<table>
<thead>
<tr>
<th></th>
<th>N/A</th>
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</table>

Comments:
Section II

Attendance & Punctuality

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<tr>
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<th>5</th>
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</table>

**Actions to consider for this topic:**
- Schedules time off in advance
- Begins working on time
- Keeps absences within guidelines
- Arrives at meetings and appointments on time
- Ensures work responsibilities are covered when absent

Comments:

Communication

<table>
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**Actions to consider for this topic:**
- Speaks clearly and persuasively
- Listens and understands clarification
- Responds well to questions
- Writes clearly and informatively
- Edits work for spelling and grammar
- Varies writing style to meet needs
- Presents numerical data effectively

Comments:
Cooperation

Actions to consider for this topic:
- Establishes and maintains effective relations
- Offers assistance and support to co-workers
- Responds to requests for service and assistance
- Uses negotiation skills to resolve conflicts
- Exhibits tact and consideration
- Works cooperatively in group situations
- Confronts difficult situations maintaining objectivity
- Encourages open communications

Comments:

Customer Service

Actions to consider for this topic:
- Displays courtesy and sensitivity
- Manages difficult or emotional customer situations
- Responds promptly to customer needs
- Handles service problems politely and efficiently
- Maintains pleasant and professional image
- Meets commitments
- Follows procedure to solve customer problems, improvises carefully
- Always available for customers
- Understands company requirements and standards

Comments:
Initiative

<table>
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<tr>
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*Actions to consider for this topic:*
- Volunteers readily
- Asks for help when needed
- Strives to achieve organizational excellence
- Follows instructions, responds to management direction
- Seeks increased responsibilities
- Responds to requests for assistance
- Keeps commitments
- Completes work in timely manner

Comments:

Planning & Organization

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*Actions to consider for this topic:*
- Selects and uses appropriate communication methods
- Prioritizes and plans work activities
- Sets goals and objectives
- Manages competing demands
- Adapts to changes in the work environment
- Completes administrative tasks correctly and on time
- Uses time effectively
- Works in an organized manner
- Follows policies and procedures

Comments:
Quality

Actions to consider for this topic:
• Demonstrates accuracy and thoroughness
• Applies feedback to improve performance
• Conserves organizational resources
• Commits to doing the best job possible
• Looks for ways to improve work quality
• Monitors own work to ensure quality
• Takes responsibility for own actions
• Meets productivity standards

Comments:

Teamwork

Actions to consider for this topic:
• Balances team and individual responsibilities
• Gives and welcomes feedback
• Exhibits objectivity and openness to others’ views
• Contributes to building a positive team spirit
• Puts success of team above own interests

Comments:
Sales Skills

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<thead>
<tr>
<th></th>
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**Actions to consider for this topic:**

- Achieves sales goals
- Overcomes objections with persuasion and persistence
- Markets products to new customers effectively
- Maintains existing business with customers
- Maintains records and promptly submits information
- Maintains customer satisfaction

Comments:
Management Categories

Leadership

Actions to consider for this topic:
• Anticipates and resolves conflict, maintains objectivity
• Turns team diversity into an advantage
• Works for consensus, supports team decisions
• Treats people with respect
• Encourages training and development
• Makes difficult decisions when a consensus cannot be reached
• Defines processes and goals
• Keeps individual and team work aligned with overall goals
• Recognizes contributions

Comments:

Performance Coaching

Actions to consider for this topic:
• Defines responsibilities and expectations
• Provides helpful, behaviorally specific feedback to others
• Delegates and monitors work assignments
• Is able to let others make decisions and take charge
• Motivates for increased results
• Regularly meets with staff to review their development progress
• Matches the responsibility to the person

Comments:
### Performance Review Rating

#### Section I: Core Duties

<table>
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<td>Core Duty 6</td>
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**Section I Total Points:** _______ Divided by (6 - # of N/A’s) equals **Section I_____ Rating**

#### Section II: Topic Areas

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**Management Topics**
-   

**Section II Total Points:** _______ Divided by (11 - # of N/A’s) equals **Section II_____ Rating**

#### Final Rating

**Sum of Section I Rating and Section II Rating:** _____
Divided by 2 equal_____ final rating
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Supervisor's Final Comments

Supervisor Signature    Date

Reviewed By: Signature    Date

Employee Comments

__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________

Employee Acknowledgment

I have reviewed this document and discussed the contents with my manager. My signature means that I have been advised of my performance status and does not necessarily imply that I agree with the evaluation. I also acknowledge that ABC is an "At-Will" Employer and this performance appraisal in no way affects that employment relationship. I have added my comments at the bottom of this page.

Employee Signature    Date

Last Updated July 2006