



# Non-manager annual evaluation form

## Employee Information

Employee Name:	<input type="text"/>	Job Title:	<input type="text"/>
Department:	<input type="text"/>	Hire Date:	<input type="text"/>
Division:	<input type="text"/>	Last Review Date:	<input type="text"/>
Reviewing Supervisor:	<input type="text"/>		



## Member Focus

Consider the employee's level of excellence in providing world class service to members and employees by meeting and/or exceeding their expectations. Rate the extent to which the employee responds to member and employee needs with courtesy, friendliness, concern and accuracy. Characteristics to consider: shows enthusiasm and passion in performing job, exhibits caring and compassionate behavior in interactions with members and employees, has trust and respect of members/employees. Results to evaluate: observations of service provided, member comments and/or letters, comments from others, internal recognition, awards, listening skills, and is comfortable with contact/interaction.

<input type="checkbox"/>	<b>Far Exceeds Performance Standards:</b> Always considers members to be the highest priority along with serving the employees to provide the highest level of service excellence to the members. Frequently recognized for going above and beyond to meet the needs of the members and employees. Exceeds the expectations of members and/or employees.
<input type="checkbox"/>	<b>Exceeds Performance Standards:</b> Considers members to be the highest priority along with serving the employees to provide the highest level of service excellence to the members. Communicates with members and/or employees to meet and even exceed realistic expectations. Consistently goes above and beyond by demonstrating service excellence.
<input type="checkbox"/>	<b>Meets Performance Standards:</b> Considers members to be a high priority along with serving the employees to provide the highest level of service excellence to the members. Ensures that members' and employees' needs and expectations are fully met. Assignments are adequately completed meeting the desired results. Employees at this level accomplish the position requirements.
<input type="checkbox"/>	<b>Needs Improvement:</b> (NOTE: This option requires an explanation in the Comments Section below). In some instances does not fully meet realistic service expectations of members and/or employees. Unable to sufficiently anticipate and/or identify members' and employees' needs.

Comments:

Development Plan:

## Committed to Organization

Consider the extent to which the employee asks "What can I do for the company to make it better?" Characteristics to consider: professionalism, reliability, loyalty and dependability. Results to evaluate: attendance record, follow-through on tasks, reliability in completing assignments, participation in voluntary activities, meeting individual and department goals, and alignment with culture, values, and mission of organization.

<input type="checkbox"/>	<b>Far Exceeds Performance Standards:</b> Sets a strong example of organizational commitment, and inspires feelings of loyalty and commitment in others. Always demonstrates a very high level of concern for the organization, and for other employees. Displays a strong sense of pride in the organization.
<input type="checkbox"/>	<b>Exceeds Performance Standards:</b> Sets a good example of organizational commitment, and inspires feelings of loyalty and commitment in others. Always demonstrates a high level of concern for the organization, and for other employees. Displays a sense of pride in the organization.
<input type="checkbox"/>	<b>Meets Performance Standards:</b> Sets an example of organizational commitment, and inspires feelings of loyalty and commitment in others. Frequently demonstrates concern for the organization, and for other employees. Displays a sense of pride in the organization. Employees at this level accomplish the position requirements.
<input type="checkbox"/>	<b>Needs Improvement:</b> (NOTE: This option requires an explanation in the Comments Section below). Does not display strong sense of loyalty and commitment to the organization. Has a negative impact on the feelings of commitment in others. Does not always demonstrate concern for the organization or for other employees. Does not frequently demonstrate a sense of pride in the organization.

Comments:

Development Plan:

## Integrity / Trust

Consider the extent to which the employee delivers messages truthfully and in an appropriate manner and maintains effective core values during both good and bad situations. Also consider employee's ability to own mistakes, treat others fairly, and ability to demonstrate the company's values by his or her actions. Characteristics to consider: honesty, awareness of the perception of themselves to others, respectful. Results to evaluate: proactive in reporting own problems or errors and makes decisions based on the "right thing to do".

<input type="checkbox"/>	<b>Far Exceeds Performance Standards:</b> Exemplary sense of responsibility and commitment. Can always be relied upon to follow through on commitments and promises. Willing to admit to mistakes.
<input type="checkbox"/>	<b>Exceeds Performance Standards:</b> Very strong sense of responsibility and commitment. Can be relied upon to follow through on commitments and promises. Willing to admit to mistakes.
<input type="checkbox"/>	<b>Meets Performance Standards:</b> Good sense of responsibility and commitment. Usually follows through on commitments and promises, with a few small delays. When approached, is willing to admit to mistakes. Employees at this level accomplish the position requirements.
<input type="checkbox"/>	<b>Needs Improvement:</b> (NOTE: This option requires an explanation in the Comments Section below). Does not display enough sense of responsibility or commitment. Often fails to follow through on commitments. Will often not admit to mistakes.

Comments:

Development Plan:

## Action-Oriented / Empowered

Consider the extent to which the employee identifies needs, finds creative solutions, welcomes change, defines problem and makes decisions in a timely manner. Also consider the extent to which the employee is sought out by others for advice and solutions, and makes appropriate decisions based on analysis, experience and personal judgment. Characteristics to consider: enthusiasm and excitement; professionalism and leadership. Results to evaluate: level of initiative exhibited in routine tasks as well as resolution of problems, responsiveness to requests from members and employees, positive response to change, proactive in addressing and identifying potential problems, and identifies hidden problems.

<input type="checkbox"/>	<b>Far Exceeds Performance Standards:</b> Excellent problem solving skills. Generates alternative solutions to reach the best resolution. Proactively anticipates and prevents problems from arising.
<input type="checkbox"/>	<b>Exceeds Performance Standards:</b> Very good problem solving skills. Generates alternative solutions to reach the best solution. Anticipates and prevents problems from arising.
<input type="checkbox"/>	<b>Meets Performance Standards:</b> Shows ability to solve problems and generate alternative solutions. Often takes a proactive approach to anticipating and preventing problems. Employees at this level accomplish the position requirements.
<input type="checkbox"/>	<b>Needs Improvement:</b> (NOTE: This option requires an explanation in the Comments Section below). Does not have good problem solving skills. Does not typically proactively nor constructively anticipate problems, nor generate ideas for solving problems that arise.

Comments:

Development Plan:

## Highly Efficient / Resourceful

Consider the extent to which the employee takes ownership, works smart, and constantly seeks to improve and streamline. Characteristics to consider: organizational skills, time management skills. Results to evaluate: transaction volume or other productivity standards, error rate, quality of work, accomplishment of goals, ability to meet deadlines, and process improvement suggestions.

<input type="checkbox"/>	<b>Far Exceeds Performance Standards:</b> Is very proactive in looking for new and more efficient processes and solutions. Has implemented outstanding new approaches that have greatly improved efficiency.
<input type="checkbox"/>	<b>Exceeds Performance Standards:</b> Proactively looks for new and more efficient processes and solutions. Has recommended new approaches that have improved efficiency.
<input type="checkbox"/>	<b>Meets Performance Standards:</b> Will look for new and more efficient processes and solutions. Has recommended some new approaches that have improved efficiency. Employees at this level accomplish the position requirements.
<input type="checkbox"/>	<b>Needs Improvement:</b> (NOTE: This option requires an explanation in the Comments Section below). Prefers to stick to the status quo, and resists change. May sometimes refer to "it's not my job" or "we have always done it this way, so why change."

Comments:

Development Plan:

## Communication Skills

Consider the employee's written and verbal communication skills and evaluate based on their relation to their position. Characteristics to consider: communication with supervisor/manager, patience in hearing other's viewpoints, and clearness in their communication to others. Results to evaluate: openness to receiving feedback and coaching, employee's communications, consistency in practicing active listening, and effectiveness in getting their message across to others.

<input type="checkbox"/>	<b>Far Exceeds Performance Standards:</b> Very strong ability to express facts and ideas clearly, in a credible and appropriate manner. Always uses an appropriate tone. Displays excellent judgment as to what information should be communicated. Always listens to others, and elicits feedback.
<input type="checkbox"/>	<b>Exceeds Performance Standards:</b> Strong ability to express facts and ideas clearly, in a credible and appropriate manner. Uses an appropriate tone. Displays very good judgment as to what information should be communicated. Frequently listens to others, and often elicits feedback.
<input type="checkbox"/>	<b>Meets Performance Standards:</b> Able to express facts and ideas clearly, in a credible and appropriate manner. Usually uses an appropriate tone. Displays good judgment as to what information should be communicated. Listens to others, and elicits feedback. Employees at this level accomplish the position requirements.
<input type="checkbox"/>	<b>Needs Improvement:</b> (NOTE: This option requires an explanation in the Comments Section below). Unable to express facts and ideas clearly. This limits credibility. Often uses an inappropriate tone. Exercises poor judgment in determining information to share with others. Unwilling to listen to others or accept feedback.

Comments:

Development Plan:

## Technical Skills

Consider the necessary technical skills for the position, and rate the employee's level in those skills. Characteristics to consider: expertise in position, knowledge/functionality in other related positions. Results to evaluate: time required to perform routine and other tasks, accuracy of work, appropriate use of resources, training completed.

<input type="checkbox"/>	<b>Far Exceeds Performance Standards:</b> Has expert level technical skills and knowledge.
<input type="checkbox"/>	<b>Exceeds Performance Standards:</b> Has strong technical skills and knowledge.
<input type="checkbox"/>	<b>Meets Performance Standards:</b> Has sufficient technical skills and knowledge to perform the job very competently. Employees at this level accomplish the position requirements.
<input type="checkbox"/>	<b>Needs Improvement:</b> (NOTE: This option requires an explanation in the Comments Section below.) Does not possess sufficient technical skills and knowledge needed to perform the job competently.

Comments:

Development Plan:



## Employee Strengths and Accomplishments

(Briefly describe at least three)

Competencies: /4.0

## Overall Employee Performance

Score: /4.0

(This is not an average of the above ratings since some performance areas are of greater significance than others. The overall rating should be the evaluation of the total overall performance.) Consider the overall performance of the employee in relation to his/her efforts to provide world class service in accordance with the mission and values of the organization.

<input type="checkbox"/>	<b>Far Exceeds Performance Standards</b>
<input type="checkbox"/>	<b>Exceeds Performance Standards</b>
<input type="checkbox"/>	<b>Meets Performance Standards</b>
<input type="checkbox"/>	<b>Needs Improvement</b> (NOTE: This option requires an explanation in the Comments Section below.)

Comments:

## New Goals

Title:

Title:

## Employee Comments

(Does not apply to Self-Review)

<input type="checkbox"/>	My Manager has had a discussion with me regarding my performance. My comments are above.
<input type="checkbox"/>	My Manager has had a discussion with me regarding my performance. I do not wish to comment.

## Manager Comments

(Does not apply to Self-Review)



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[www.skillnet.net](http://www.skillnet.net)

Phone: (888) 450-6665

