



# Annual employee performance evaluation form

|                 |                      |  |                      |
|-----------------|----------------------|--|----------------------|
| Appraisal Score |                      | Overall Score: <input type="text"/> /5.0 |                      |
| Name:           | <input type="text"/> | Job Title:                               | <input type="text"/> |
| Manager Name:   | <input type="text"/> | Department:                              | <input type="text"/> |
| Hire Date:      | <input type="text"/> | Last Appraisal Date:                     | <input type="text"/> |
| Evaluated By:   | <input type="text"/> |  |                      |

## DEFINITION OF RATINGS

**EXCEPTIONAL (5):** Consistently exceeds all relevant performance standards. Provides leadership, fosters teamwork, is highly productive, innovative, responsive and generates top quality work. Active in industry-related professional and/or community groups.

**EXCEEDS EXPECTATIONS (4):** Consistently meets and often exceeds all relevant performance standards. Shows initiative and versatility, works collaboratively, has strong technical & interpersonal skills or has achieved significant improvement in these areas.

**MEETS EXPECTATIONS (3):** Meets all relevant performance standards. Seldom exceeds or falls short of desired results or objectives. Lacks appropriate level of skills or is inexperienced/still learning the scope of the job.

**BELOW EXPECTATIONS (2):** Sometimes meets the performance standards. Seldom exceeds and often falls short of desired results. Performance has declined significantly, or employee has not sustained adequate improvement, as required since the last performance review or performance improvement plan.

**NEEDS IMPROVEMENT (1):** Consistently falls short of performance standards.

## INSTRUCTIONS

Describe the employee's contributions in each of the performance categories below. **It is IMPERATIVE that you illustrate specific, detailed examples since the last performance evaluation. Ratings MUST support and be substantiated by narrative comments.**

PERSONAL ATTRIBUTES (Matrix format)

Score: /5.0

| Competency  | Ratings scale | Comments |   | Score /5.0 |
|---|---------------|----------|---|------------|
| <p><b>Quality</b><br/>Completes high-quality work according to specifications. Thoroughly follows standards and procedures. Keeps complete records. Pays attention to details. Has a strong sense of quality and knows how to achieve it.</p> |               |          |    |            |
| <p><b>Desire to Improve Quality</b><br/>Continually looks for ways to improve and promote quality. Applies feedback to improve performance.</p>   |               |          |    |            |
| <p><b>Job Knowledge</b><br/>Possesses skills and knowledge to perform the job competently.</p>  |               |          |    |            |
| <p><b>Communication</b><br/>Organizes and expresses ideas and information clearly, using appropriate and efficient methods of conveying the information.</p>  |               |          |    |            |
| <p><b>Interpersonal Skills</b><br/>Is sensitive to the needs, feelings and capabilities of others. Approaches others in a non-threatening and pleasant manner and treats them with respect.</p>   |               |          |    |            |
| <p><b>Conflict Resolution</b><br/>Expresses alternative points of view in a non-threatening way. Knows when it is appropriate to compromise and when it is important to take a stand.</p>   |               |          |  |            |
| <p><b>Teamwork</b><br/>Works on projects as part of a team, exchanging ideas and contributing skills that complement those of the other team members. Fulfills commitments to team members.</p>   |               |          |  |            |
| <p><b>Ethics</b><br/>Maintains high level of character and a professional attitude. Is able to conform and promote the company's standards of conduct.</p>  |               |          |  |            |
| <p><b>Initiative</b><br/>Strives to learn and improve. Seeks out ways to better himself/herself and the company. Takes on responsibilities. Does not remain idle. Is hard working and self-motivated.</p>                                     |               |          |  |            |

## SUMMARY SCORE

| PERSONAL ATTRIBUTES (Matrix format) | Score: 0 | Score: 1.3 | Score: 2.5 | Score: 3.8 | Score: 5 |
|-------------------------------------|----------|------------|------------|------------|----------|
| Quality                             |          |            |            |            |          |
| Desire to Improve Quality           |          |            |            |            |          |
| Job Knowledge                       |          |            |            |            |          |
| Communication                       |          |            |            |            |          |
| Interpersonal Skills                |          |            |            |            |          |
| Conflict Resolution                 |          |            |            |            |          |
| Teamwork                            |          |            |            |            |          |
| Ethics                              |          |            |            |            |          |

## PERSONAL ATTRIBUTES (Short format)

**Initiative** Employee Score:  / 5.0      Manager Score:  / 5.0

Works independently to solve problems.  
Looks for opportunities to take on more responsibility.

Exceptional

Exceeds Expectations

Meets Expectations

Below Expectations

Needs Improvement

Not applicable

Self Comments:

Development Plan:

**Initiative Thinking**

Employee Score:  / 5.0

Manager Score:  / 5.0

Looks for ways to improve effectiveness by implementing new ideas and more efficient approaches

- Exceptional
- Exceeds Expectations
- Meets Expectations
- Below Expectations
- Needs Improvement
- Not applicable

Self Comments:

Development Plan:

**Seeking Feedback**

Employee Score:  / 5.0

Manager Score:  / 5.0

Proactively seeks performance feedback and identifies approaches to improve performance

- Exceptional
- Exceeds Expectations
- Meets Expectations
- Below Expectations
- Needs Improvement
- Not applicable

Self Comments:

Development Plan:

# PERSONAL ATTRIBUTES (Extended Matrix format)

Score: /5.0

5 - Exceptional; 4 - Exceeds Expectations; 3 - Meets Expectations; 2 - Below Expectations; 1 - Needs Improvement.

| Rating  | 1 <sup>st</sup> Quarter  | 2 <sup>nd</sup> Quarter  | 3 <sup>rd</sup> Quarter  | 4 <sup>th</sup> Quarter  | Score /5.0 |
|---|--|--|--|--|------------|
| <b>Quality</b><br>Completes high-quality work according to specifications. Thoroughly follows standards and procedures. Keeps complete records. Pays attention to details. Has a strong sense of quality and knows how to achieve it. | <input type="checkbox"/> 5<br><input type="checkbox"/> 4<br><input type="checkbox"/> 3<br><input type="checkbox"/> 2<br><input type="checkbox"/> 1 | <input type="checkbox"/> 5<br><input type="checkbox"/> 4<br><input type="checkbox"/> 3<br><input type="checkbox"/> 2<br><input type="checkbox"/> 1 | <input type="checkbox"/> 5<br><input type="checkbox"/> 4<br><input type="checkbox"/> 3<br><input type="checkbox"/> 2<br><input type="checkbox"/> 1 | <input type="checkbox"/> 5<br><input type="checkbox"/> 4<br><input type="checkbox"/> 3<br><input type="checkbox"/> 2<br><input type="checkbox"/> 1 |            |
| <b>Desire to Improve Quality</b><br>Continually looks for ways to improve and promote quality. Applies feedback to improve performance.   | <input type="checkbox"/> 5<br><input type="checkbox"/> 4<br><input type="checkbox"/> 3<br><input type="checkbox"/> 2<br><input type="checkbox"/> 1 | <input type="checkbox"/> 5<br><input type="checkbox"/> 4<br><input type="checkbox"/> 3<br><input type="checkbox"/> 2<br><input type="checkbox"/> 1 | <input type="checkbox"/> 5<br><input type="checkbox"/> 4<br><input type="checkbox"/> 3<br><input type="checkbox"/> 2<br><input type="checkbox"/> 1 | <input type="checkbox"/> 5<br><input type="checkbox"/> 4<br><input type="checkbox"/> 3<br><input type="checkbox"/> 2<br><input type="checkbox"/> 1 |            |
| <b>Job Knowledge</b><br>Possesses skills and knowledge to perform the job competently.  | <input type="checkbox"/> 5<br><input type="checkbox"/> 4<br><input type="checkbox"/> 3<br><input type="checkbox"/> 2<br><input type="checkbox"/> 1 | <input type="checkbox"/> 5<br><input type="checkbox"/> 4<br><input type="checkbox"/> 3<br><input type="checkbox"/> 2<br><input type="checkbox"/> 1 | <input type="checkbox"/> 5<br><input type="checkbox"/> 4<br><input type="checkbox"/> 3<br><input type="checkbox"/> 2<br><input type="checkbox"/> 1 | <input type="checkbox"/> 5<br><input type="checkbox"/> 4<br><input type="checkbox"/> 3<br><input type="checkbox"/> 2<br><input type="checkbox"/> 1 |            |
| <b>Communication</b><br>Organizes and expresses ideas and information clearly, using appropriate and efficient methods of conveying the information.  | <input type="checkbox"/> 5<br><input type="checkbox"/> 4<br><input type="checkbox"/> 3<br><input type="checkbox"/> 2<br><input type="checkbox"/> 1 | <input type="checkbox"/> 5<br><input type="checkbox"/> 4<br><input type="checkbox"/> 3<br><input type="checkbox"/> 2<br><input type="checkbox"/> 1 | <input type="checkbox"/> 5<br><input type="checkbox"/> 4<br><input type="checkbox"/> 3<br><input type="checkbox"/> 2<br><input type="checkbox"/> 1 | <input type="checkbox"/> 5<br><input type="checkbox"/> 4<br><input type="checkbox"/> 3<br><input type="checkbox"/> 2<br><input type="checkbox"/> 1 |            |
| <b>Interpersonal Skills</b><br>Is sensitive to the needs, feelings and capabilities of others. Approaches others in a non-threatening and pleasant manner and treats them with respect.   | <input type="checkbox"/> 5<br><input type="checkbox"/> 4<br><input type="checkbox"/> 3<br><input type="checkbox"/> 2<br><input type="checkbox"/> 1 | <input type="checkbox"/> 5<br><input type="checkbox"/> 4<br><input type="checkbox"/> 3<br><input type="checkbox"/> 2<br><input type="checkbox"/> 1 | <input type="checkbox"/> 5<br><input type="checkbox"/> 4<br><input type="checkbox"/> 3<br><input type="checkbox"/> 2<br><input type="checkbox"/> 1 | <input type="checkbox"/> 5<br><input type="checkbox"/> 4<br><input type="checkbox"/> 3<br><input type="checkbox"/> 2<br><input type="checkbox"/> 1 |            |
| <b>Conflict Resolution</b><br>Expresses alternative points of view in a non-threatening way. Knows when it is appropriate to compromise and when it is important to take a stand.   | <input type="checkbox"/> 5<br><input type="checkbox"/> 4<br><input type="checkbox"/> 3<br><input type="checkbox"/> 2<br><input type="checkbox"/> 1 | <input type="checkbox"/> 5<br><input type="checkbox"/> 4<br><input type="checkbox"/> 3<br><input type="checkbox"/> 2<br><input type="checkbox"/> 1 | <input type="checkbox"/> 5<br><input type="checkbox"/> 4<br><input type="checkbox"/> 3<br><input type="checkbox"/> 2<br><input type="checkbox"/> 1 | <input type="checkbox"/> 5<br><input type="checkbox"/> 4<br><input type="checkbox"/> 3<br><input type="checkbox"/> 2<br><input type="checkbox"/> 1 |            |
| <b>Teamwork</b><br>Works on projects as part of a team, exchanging ideas and contributing skills that complement those of the other team members. Fulfills commitments to team members.   | <input type="checkbox"/> 5<br><input type="checkbox"/> 4<br><input type="checkbox"/> 3<br><input type="checkbox"/> 2<br><input type="checkbox"/> 1 | <input type="checkbox"/> 5<br><input type="checkbox"/> 4<br><input type="checkbox"/> 3<br><input type="checkbox"/> 2<br><input type="checkbox"/> 1 | <input type="checkbox"/> 5<br><input type="checkbox"/> 4<br><input type="checkbox"/> 3<br><input type="checkbox"/> 2<br><input type="checkbox"/> 1 | <input type="checkbox"/> 5<br><input type="checkbox"/> 4<br><input type="checkbox"/> 3<br><input type="checkbox"/> 2<br><input type="checkbox"/> 1 |            |

|   |  |  |  |  |  |
|---|--|--|--|--|--|
| <b>Ethics</b><br>Maintains high level of character and a professional attitude. Is able to conform and promote the company's standards of conduct.  | <input type="checkbox"/> 5<br><input type="checkbox"/> 4<br><input type="checkbox"/> 3<br><input type="checkbox"/> 2<br><input type="checkbox"/> 1 | <input type="checkbox"/> 5<br><input type="checkbox"/> 4<br><input type="checkbox"/> 3<br><input type="checkbox"/> 2<br><input type="checkbox"/> 1 | <input type="checkbox"/> 5<br><input type="checkbox"/> 4<br><input type="checkbox"/> 3<br><input type="checkbox"/> 2<br><input type="checkbox"/> 1 | <input type="checkbox"/> 5<br><input type="checkbox"/> 4<br><input type="checkbox"/> 3<br><input type="checkbox"/> 2<br><input type="checkbox"/> 1 |  |
| <b>Initiative</b><br>Strives to learn and improve. Seeks out ways to better himself/herself and the company. Takes on responsibilities. Does not remain idle. Is hard working and self-motivated. | <input type="checkbox"/> 5<br><input type="checkbox"/> 4<br><input type="checkbox"/> 3<br><input type="checkbox"/> 2<br><input type="checkbox"/> 1 | <input type="checkbox"/> 5<br><input type="checkbox"/> 4<br><input type="checkbox"/> 3<br><input type="checkbox"/> 2<br><input type="checkbox"/> 1 | <input type="checkbox"/> 5<br><input type="checkbox"/> 4<br><input type="checkbox"/> 3<br><input type="checkbox"/> 2<br><input type="checkbox"/> 1 | <input type="checkbox"/> 5<br><input type="checkbox"/> 4<br><input type="checkbox"/> 3<br><input type="checkbox"/> 2<br><input type="checkbox"/> 1 |  |

## INSTRUCTIONS FOR NEW GOALS

Identify a minimum of two new objectives. These objectives must be those that the employee agreed to accomplish over the coming year and address any one of the following areas:

Project goals are specific assignments to participate in or manage ongoing or future projects. When setting project oriented goals, outline the scope of the role the employee is to play, lists resources and completion time frame and define the desired result.

## NEW GOALS

|                     |                      |                      |                      |
|---------------------|----------------------|----------------------|----------------------|
| Title:              | <input type="text"/> | Objectives:          | <input type="text"/> |
| Due:                | <input type="text"/> |                      |                      |
| Weight:             | <input type="text"/> |                      |                      |
| Action Items/Steps: | <input type="text"/> | Measures of Success: | <input type="text"/> |

|                     |                      |                      |                      |
|---------------------|----------------------|----------------------|----------------------|
| Title:              | <input type="text"/> | Objectives:          | <input type="text"/> |
| Due:                | <input type="text"/> |                      |                      |
| Weight:             | <input type="text"/> |                      |                      |
| Action Items/Steps: | <input type="text"/> | Measures of Success: | <input type="text"/> |

# INSTRUCTIONS FOR RATING PAST GOALS

Evaluate past goals by assessing the accomplishments achieved in each category.

## PAST GOALS

|                      |                               |                  |                      |
|----------------------|-------------------------------|------------------|----------------------|
| Title:               | <input type="text"/>          | Accomplishments: | <input type="text"/> |
| Score:               | <input type="checkbox"/> /5.0 |                  |                      |
| Weight:              | <input type="checkbox"/> %    |                  |                      |
| Action Items/Steps:  | <input type="text"/>          | Accomplishments: | <input type="text"/> |
| Measures of Success: | <input type="text"/>          | Accomplishments: | <input type="text"/> |
| Due:                 | <input type="text"/>          | Completed:       | <input type="text"/> |

|                      |                               |                  |                      |
|----------------------|-------------------------------|------------------|----------------------|
| Title:               | <input type="text"/>          | Accomplishments: | <input type="text"/> |
| Score:               | <input type="checkbox"/> /5.0 |                  |                      |
| Weight:              | <input type="checkbox"/> %    |                  |                      |
| Action Items/Steps:  | <input type="text"/>          | Accomplishments: | <input type="text"/> |
| Measures of Success: | <input type="text"/>          | Accomplishments: | <input type="text"/> |
| Due:                 | <input type="text"/>          | Completed:       | <input type="text"/> |



## PAST GOALS (NOT RATED)

|                      |                      |                  |                      |
|----------------------|----------------------|------------------|----------------------|
| Title:               | <input type="text"/> | Accomplishments: | <input type="text"/> |
| Due:                 | <input type="text"/> |                  |                      |
| Completed:           | <input type="text"/> |                  |                      |
| Action Items/Steps:  | <input type="text"/> | Accomplishments: | <input type="text"/> |
| Measures of Success: | <input type="text"/> | Accomplishments: | <input type="text"/> |

|                      |                      |                  |                      |
|----------------------|----------------------|------------------|----------------------|
| Title:               | <input type="text"/> | Accomplishments: | <input type="text"/> |
| Due:                 | <input type="text"/> |                  |                      |
| Completed:           | <input type="text"/> |                  |                      |
| Action Items/Steps:  | <input type="text"/> | Accomplishments: | <input type="text"/> |
| Measures of Success: | <input type="text"/> | Accomplishments: | <input type="text"/> |

## INSTRUCTIONS FOR DEVELOPMENT PLANS

Enter development plans to be worked on for the upcoming review period. Click on the "Select Development Plan" link to the left of the development field to choose from a list of available training courses/programs.

Title:

Objectives:

Title:

Objectives:

## EMPLOYEE/MANAGER COMMENTS

Employee Comments:

I agree with this evaluation

I do not agree with this evaluation

Manager Comments:



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