

### Annual Performance Appraisal

#### Appraisal Score

Name:

Manager:

Score:

 /5.0 (0%)

Job Title:

Department:

#### Ratings Definition

**EXCEPTIONAL (5):** Consistently exceeds all relevant performance standards. Provides leadership, fosters teamwork, is highly productive, innovative, responsive and generates top quality work.

**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.







**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

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

#### Goal Results

Score:

 /5.0  %

Goals	Results	Score	Weight
Title: <input type="text"/>   <input type="text"/> Rating: -----	<input type="text"/>	<input type="text"/> /5.0	<input type="text"/> %
Title: <input type="text"/>   <input type="text"/> Rating: -----	<input type="text"/>	<input type="text"/> /5.0	<input type="text"/> %
Title: <input type="text"/>   <input type="text"/> Rating: -----	<input type="text"/>	<input type="text"/> /5.0	<input type="text"/> %

## Instructions

Describe the employee's contributions in each of the performance categories below. **Make sure that you provide specific, detailed examples of behavior and performance since the last appraisal. Ratings MUST support and be substantiated by narrative comments.**

	<b>Employee Score:</b>	<input type="text"/>	
<b>Core Competencies - Total:</b>	<b>Manager Score:</b>	<input type="text"/>	/5.0 <input type="text" value="60"/> %

	<b>Employee Score:</b>	<input type="text"/>	/5.0
<b>Customer Focus</b>	<b>Manager Score:</b>	<input type="text"/>	/5.0 (25%)

Personally demonstrates that external (or internal) customers are a high priority. Identifies customer needs and expectations and responds to them in a timely and effective manner. Anticipates and prevents delays or other things that can adversely affect the customer. Keeps customers informed about the status of pending actions and inquires about customer satisfaction with products or services. This is in sharp contrast to behavior patterns that tend to disappoint customers, leave them feeling forgotten and unimportant or that otherwise result in unmet needs or expectations.

- Considers customers to be a priority, and works closely with them to identify and anticipate their needs. Maintains frequent communication with the customer to set realistic expectations. Consistently ensures that their needs and expectations are met.
- Considers customers to be a priority, and listens to their needs. Is frequently able to anticipate their needs. Maintains communication with the customer to set realistic expectations. Strives to ensure that their needs and expectations are met.
- Usually makes customers a priority, and has been able to identify their needs. Attempts to set realistic expectations. Works toward meeting customers' needs and expectations.
- Has difficulty anticipating and identifying customer needs, and is not always able to ensure that their needs are met. Must work more closely with customers.
- Unable to anticipate and identify customer needs. Does not work closely with customers to ensure that their needs are met.
- Not applicable.

<b>Self:</b>	N/A
<b>Comments:</b>	<div style="border: 1px solid gray; height: 50px; width: 100%;"></div> <div style="text-align: right;">  </div>

 [Development Plan:](#)

	<b>Employee Score:</b>	<input type="text"/>	/5.0
<b>Teamwork</b>	<b>Manager Score:</b>	<input type="text"/>	/5.0 (20%)

Is an effective team player who adds complementary skills and contributes valuable ideas, opinions and feedback. Communicates in an open and candid manner and can be counted on to fulfill any commitments made to others on the team. This is distinctly different from those who withhold ideas and opinions, offer ideas or opinions that rarely add value to team discussions, have established a track record with many unmet commitments, and/or have not contributed skills that complement the skills of others on the team.

- Strong team player. Regularly conveys good ideas and opinions to the team. Has a positive impact on the team dynamics. Adds many complementary skills to the team.

- Very good team player. Sometimes conveys good ideas and opinions to the team. Has potential to have a positive impact on team dynamics. Adds several complementary skills to the team.
- Works well with others, but at times lacks confidence to contribute ideas and opinions. Has limited impact on team dynamics. Adds a complementary skill to the team.
- Does not work well in a team environment. Prefers to work independently. Lacks confidence to contribute ideas and opinions, and does not have a positive impact on team dynamics. Does not add a complementary skill to the team.
- Does not work well in a team environment, and has a negative impact on the exchange of ideas and opinions. Does not make a positive contribution to the team.
- Not applicable.

**Self:** N/A

**Comments:**





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**Initiative**

**Employee Score:**

/5.0

**Manager Score:**

/5.0 (20%)

Recognizes opportunities and initiates actions to capitalize on them. Looks for new and productive ways to make an impact. Demonstrates this characteristic when it comes to generating new ideas or processes, capitalizing on new business opportunities, seeking-out and taking-on increasing responsibility or resolving problems as they occur. Uses sound judgment about when to take action and when to seek guidance or permission. This is in contrast to those who fail to notice opportunities, wait to be asked or instructed before taking action, seldom offer new ideas or express reservations about taking on additional responsibilities.

- Consistently takes the initiative to resolve problems with minimal assistance from management. Has taken on new responsibilities, and acted on opportunities.
- Has taken the initiative to resolve problems with minimal assistance from management. Willing to take on new responsibilities and act on opportunities.
- Has taken the initiative to look for resolutions to problems, involving management at times. Usually willing to take on new responsibilities and act on opportunities.
- Requires encouragement and input from managers before taking on new responsibilities or looking for solutions to problems. Hesitant to take on new responsibilities or act on opportunities. .
- Does not demonstrate initiative to solve problems or take on new responsibilities. Very reluctant to take on new responsibilities or act on opportunities.
- Not applicable.

**Self:** N/A

**Comments:**





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## Innovative Thinking

Employee Score:

 /5.0

Manager Score:

 /5.0 (20%)

Is on-the-lookout for new and innovative approaches that will improve efficiency. Embraces and champions new ideas and encourages others to do likewise. Recognizes and rewards people and teams who are creative and innovative. This is in sharp contrast to those who tend to embrace the status quo, struggle with new approaches and discourage others when they are creative and innovative in the pursuit of increased efficiency or effectiveness.

- Always keeps an eye out for new and more efficient processes and solutions. Has implemented new approaches that have greatly improved efficiency.
- Keeps an eye out for new and more efficient processes and solutions. Has recommended new approaches that have improved efficiency.
- Keeps an eye out for new and more efficient processes and solutions. Has not recommended any new approaches at this time.
- Prefers to stick to the status quo, but is willing to listen to the ideas of others.
- Prefers to stick to the status quo, and resists change.
- Not applicable.

<b>Self:</b>	N/A
<b>Comments:</b>	<div style="border: 1px solid gray; height: 60px; width: 100%;"></div> <div style="text-align: right;">   </div>

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## Seeking Feedback

Employee Score:

 /5.0

Manager Score:

 /5.0 (20%)

Tends to seek out feedback for the purpose of improving work performance and listens to such feedback with an open mind. Leaves those who provide feedback satisfied that they have been heard and that their suggestions will be put to use. This is in clear contrast to those who fail to initiate requests for constructive feedback, come across as closed and defensive when presented with suggestions for improved effectiveness and leave the person providing feedback doubtful that it has been taken to heart or will lead to positive changes in the behavior of the receiver.

- Regularly asks for feedback. Open to constructive criticism, and implements the ideas and suggestions to improve performance.
- Occasionally asks for feedback. Open to constructive criticism, and has implemented some ideas and suggestions.
- Does not ask for feedback, but is open to constructive criticism when approached. Has implemented some ideas and suggestions.
- Does not ask for feedback. Has displayed some hesitation in accepting constructive criticism. Has implemented few ideas and suggestions.
- Displays an unwillingness to listen to constructive feedback and implement suggestions.
- Not applicable.

**Self:** N/A

**Comments:**

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**Job Specific Competencies - Total:**

**Score:**  /5.0  %

Competency	Comments:		Ratings Scale	Score /5.0
<b>Strategic Thinking:</b> Can analyze organizational strengths and weaknesses and then combine these with knowledge of the industry, market and organization to develop long-term strategy.	<div style="border: 1px solid gray; height: 40px; width: 100%;"></div>		<div style="border: 1px solid gray; padding: 2px;">-----</div>	(20%)
<b>Leadership:</b> Articulates a vision that others choose to follow. Models behaviors expected of others and inspires others to undertake challenging tasks and projects.	<div style="border: 1px solid gray; height: 40px; width: 100%;"></div>		<div style="border: 1px solid gray; padding: 2px;">-----</div>	(25%)
<b>Entrepreneurial Orientation:</b> Takes an active role in identifying new business opportunities, assessing the risks involved and comparing these to the potential advantages of taking action.	<div style="border: 1px solid gray; height: 40px; width: 100%;"></div>		<div style="border: 1px solid gray; padding: 2px;">-----</div>	(25%)
<b>Conflict Resolution:</b> Takes actions that resolve conflicts in a manner that is best for both the organization and the individuals involved.	<div style="border: 1px solid gray; height: 40px; width: 100%;"></div>		<div style="border: 1px solid gray; padding: 2px;">-----</div>	(15%)
<b>Building Organizational Commitment:</b> Demonstrates commitment, loyalty and appreciation for the organization. Conveys a high level of concern for all employees, helping to ensure that both their needs and those of the organization are met.	<div style="border: 1px solid gray; height: 40px; width: 100%;"></div>		<div style="border: 1px solid gray; padding: 2px;">-----</div>	(15%)

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## Goal Setting Instructions

Employee goals should follow the **SMART** format:

**S** - specific

**M** - measurable

**A** - achievable

**R** - realistic

**T** - time-bound

Set a minimum of two and a maximum of five individual goals. Wherever possible, link each employee goal to an organizational goal that it will impact either directly or indirectly.

## Goals

### Goals

### Weight

Title:

 %

Due Date:

Milestones/Deliverables:

Measures of Success:

Title:

 %

Due Date:

Milestones/Deliverables:

Measures of Success:

## Writing Development Plans

Define development plans for the upcoming review period. Click the Development Plan icon to the left of the development plan title to choose from a list of available training courses/activities.

Click the Add New button to enter additional development plans (total maximum of 5 development plans).

## Development Plans

Title:  Due Date:  

Title:  Due Date:  

 [Add New...](#)

## Employee Comments

- I agree with this evaluation.
- I do not agree with this evaluation.

## Manager Comments



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