

ACTION CHECKLIST

Transform Your HR Challenge

1. Gather all employees who are responsible for doing performance evaluations
2. Distribute Performance Evaluation & Development Plan
3. Go through each section of the Plan until managers are familiar and comfortable with it. Tweak as needed.
4. Explain the importance of the Development Plan, and how this is important to the future growth of the organization
5. Establish a performance evaluation schedule. This could be quarterly, semi-annually, annually, or some other formula. (Recommendation: create a system that will be easy to follow. Too many evaluations will create an administrative nightmare.)
6. Continue training as needed for new managers

*Need another copy of the forms or want to modify them?
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Performance Evaluation & Development Plan

Performance Evaluation

Employee Name _____ Department _____

Title _____ Date Started Current Position _____

Date of Review _____ Current Supervisor _____

Instructions

- Review employee's performance for the entire period; refrain from basing judgments on recent or isolated events only. Concentrate on rating one factor at a time.
- Consider the employee on the basis of the standards expected to be met for the job the employee is assigned based on the length of time in the job. Rate the employee on how well the requirements of the job are fulfilled.
- Place a check in the box that summarizes the employee's performance in that factor since the last review (or from date of hire if this is the employee's first review).
- Keep in mind the relative importance of the factors will vary according to the position.
- After rating the employee on each factor, enter examples to support the rating.
- Guard against letting your appraisal of factors fall into a consistent or routine pattern. There are usually wide differences in individuals with respect to various factors considered.

Part 1: Responsibilities and Accomplishments

Responsibilities: List the employee's major job responsibilities.

Accomplishments: List the employee's major accomplishments since the last review. What went well? What could have been better? Comment on barriers to completion or any other noteworthy points.

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Part 2: Employee Rating by Category

Rate the employee by checking the appropriate box and enter comments to support the rating. When there are no job duties/responsibilities relating to a particular category, write "Not Applicable" and move to the next category.

Job Knowledge: Employee's ability for the technical/professional requirements of the job. The adequacy of employee's skills and employee's understanding of normal job requirements. Employee's understanding of related functions. Employee's efforts to keep skills current. How well employee executes against goals and objectives.

Consistently
Below
Expectations

Occasionally
Below
Expectations

Consistently
Meets
Expectations

Frequently
Exceeds
Expectations

Consistently
Exceeds
Expectations

Supporting Examples:

Personal Management: Employee's establishment of effective job priorities and objectives. How well employee manages their time and meets deadlines. Employee's ability to handle several assignments at once. Employee's ability to handle pressure effectively. Quality of employee's work. Employee's use of a planned, thorough approach to problems.

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Supporting Examples:

Judgment: Employee's display of well-balanced thinking. Employee's thinking through of a problem and potential consequences before acting. Ability to reach decisions quickly and accurately when necessary.

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Supporting Examples:

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Dealings with People: The mutual cooperation that exists with other individuals and departments. The confidence others have in employee. Employee's tactfulness and diplomacy. Employee's ability to try new ideas and suggestions, their ability to adapt to new methods or ideas.

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Supporting Examples:

Attitude: The interest and enthusiasm employee shows to job and company. Employee's sustained efforts to achieve company and department objectives. Employee's respect for confidences. Employee's ability to adapt to changing conditions effectively.

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Supporting Examples:

Initiative: Employee's resourcefulness in solving unusual problems. The frequency and value of employee's suggestions to simplify, and streamline their work. Takes initiative and acts proactively, self-motivated. Does employee take responsibility or must it be given? Is employee openly accountable for their actions? Employee's ability to produce new approaches, methods, shortcuts and new ways to achieve objectives in the face of obstacles.

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Supporting Examples:

Financial Responsibility: Uses the company resources effectively. Controls expenditures and contributes cost reduction ideas. Plans appropriate allocation of resources and assignments of staff.

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Supporting Examples:

Teamwork: Works effectively with colleagues and peers of different backgrounds and perspectives. Cooperates and contributes to team efforts. Gives their best effort and keeps team goals in mind. Promotes group success instead of self-promotion.

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Supporting Examples:

Management Effectiveness: Ability to recruit, lead, motivate and develop a team. Confidence peers and subordinates have in employee. Ability to establish and build trust and communicate in an inspiring, non-threatening manner. Uses influencing skills, commands respect, provides feedback, coaches and mentors others.

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Supporting Examples:

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Overall Evaluation

After completing ratings, review the categories. You may want to consider some categories more important than others in determining your final evaluation. Please read the following descriptions and check the level that describes the overall performance of your employee.

Level 1 - Consistently Below Expectations

Performance is below expectations for most aspects of the job.

Level 2 - Occasionally Below Expectations

Performance occasionally does not meet expectations for some aspects of the job. Objectives occasionally are not met or are met with a minimum level of acceptability.

Level 3 - Consistently Meets Expectations

Performance fully meets the expectations for all aspects of the job. The employee's performance is consistent, reliable and effective. Employee is able to accomplish all established objectives.

Level 4 - Frequently Exceeds Expectations

Performance frequently exceeds the expectations for most aspects of the job on a sustained basis. Employee performs complex, difficult parts of the job competently and thoroughly, including extra or unique tasks assigned.

Level 5 - Consistently Surpasses Expectations

Employee excels in virtually all aspects of the job, having nearly reached the ultimate in job performance on a sustained basis. Performance is of a quality rarely achieved.

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Part 3: Goals and Objectives

List 1 to 3 goals (minimum) to be obtained by the employee before the employee's next review. These should be specific, measurable, achievable, relevant, time-bound, and linked to departmental/corporate objectives. These may include new and better ways to carry out job responsibilities, manage the employee's future development and increase their current performance. Include specific steps for the employee to take.

Supervisor's Signature

Date

2nd Level Supervisor

Date

I have seen and reviewed my evaluation, and all items have been covered with me.

Employee's Signature

Date

Employee comments:

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Employee Development Plan

Employee Name _____ Department _____

Title _____ Date Started Current Position _____

Date of Plan _____ Current Supervisor _____

- **What is the employee's current skill level?**
- **What are the employee's career aspirations?**
- **What training or skill development would help develop the employee's potential?**
- **What is the plan of action?**

Supervisor's Signature

Date

2nd Level Supervisor

Date

Employee's Signature

Date