

Conducting Performance Evaluations

Performance reviews are an essential tool for managing a company's workforce. A comprehensive review system will establish performance expectations, aid in retaining good employees and can ultimately improve a company's overall business performance.

Performance reviews also give management the information needed to support decisions regarding compensation, promotions, training and career development, transfers, and termination. Often, performance reviews are dismissed as overly time-consuming. However, when used properly, the benefits are worth the investment in terms of increased performance, productivity, quality of work, reduction in turnover and decreased employee relations problems.

A successful performance appraisal process involves explaining the job, communicating expectations, observing and documenting behavior and providing frequent informal feedback. The continual process of evaluating an employee's performance helps the supervisor and the employee to:

- ▲ Understand individual strengths and weaknesses of performance;
- ▲ Mutually understand expectations for performance;
- ▲ Form a basis for personnel action; and
- ▲ Determine training and development needs of employees.

The Purpose of the Performance Evaluation

The purpose of an evaluation system is to provide employees and the organization with information on performance and to improve work performance through a regular and careful appraisal process. When evaluation is done thoughtfully and skillfully, it achieves several important purposes:

Informational Purposes

- ▲ To let employees know how their performance compares with job standards;
- ▲ To provide a written record of employee performance;
- ▲ To assist in identifying special talents and abilities;
- ▲ To identify employees whose performance must improve or face disciplinary action, and make this a matter of record.

Motivational Purposes

- ▲ To establish closer supervisor-employee relationships and communicate to the employee the job requirements and standards of performance;
- ▲ To provide recognition for a job well done;
- ▲ To establish plans to solve performance problems; and
- ▲ To encourage initiative and develop a sense of responsibility.

Developmental Purposes

- ▲ To identify individual employee training needs;
- ▲ To help the employee strengthen current performance and prepare for promotional opportunities; and
- ▲ To identify situations in which reassignment can be used to develop potential or skill enhancement weaknesses.

SAMPLE EVALUATION (on next page)

Purpose:

The purpose of conducting the Performance Appraisal is to: Develop better communication between the employee and the supervisor; Improve the quality of work; Increase productivity; and Promote employee development. Performance Rating Categories: Consider the employee's performance in each category and designate the level of performance that most accurately describes his/her job performance.

Outstanding.

Employee consistently exceeds position expectations with virtually no detected preventable/controllable errors, requiring little or no supervision.

Exceeds Expectations.

Results clearly exceed position requirements on a regular basis. Performance is of high quality and is achieved on a consistent basis.

Meets Expectations.

Competent & dependable performance level. Meets the performance standards and objectives of the job without constant follow-up / direction.

Improvement Needed.

Employee does not meet performance objectives on a regular basis and has difficulty following through with tasks. Requires constant follow-up and or supervision.

N/A – Not applicable or too soon to rate.

Employee Name: _____ Job Title: _____

Date of Hire: _____ Department: _____ Supervisor: _____

Annual Review 90 Day Review Review Period: From _____ To _____

GENERAL FACTORS	
1. Quality -The extent to which an employee's work is completed thoroughly and correctly following established process & procedures. Required paperwork is thorough and neat. <i>Comments:</i>	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Improvement Needed <input type="checkbox"/> Not Applicable
2. Productivity / Independence / Reliability - The extent to which an employee produces a significant volume of work efficiently in a specified period of time. Ability to work independently with little or no direction / follow-up to complete tasks / job assignment. <i>Comments:</i>	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Improvement Needed <input type="checkbox"/> Not Applicable
3. Job Knowledge - The extent to which an employee possesses and demonstrates an understating of the work instructions, processes, equipment and materials required to perform the job. Employee possesses the practical and technical knowledge required of the job. <i>Comments:</i>	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Improvement Needed <input type="checkbox"/> Not Applicable
4. Interpersonal Relationships / Cooperation / Commitment - The extent to which employee is willing and demonstrates the ability to cooperate, work and communicate with coworkers, supervisors, subordinates and/or outside contacts. Employee accepts and responds to change in a positive manner. Accepts job assignments and additional duties willingly, takes responsibility for own performance and job assignments. <i>Comments:</i>	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Improvement Needed <input type="checkbox"/> Not Applicable
5. Attendance - The extent to which an employee is punctual, observes prescribed work break / meal periods and has an acceptable overall attendance record. Employee's willingness to work overtime as required. <i>Comments:</i>	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Improvement Needed <input type="checkbox"/> Not Applicable
6. Initiative / Creativity - The extent to which an employee seeks out new assignments, proposes improved work methods, suggests ideas to eliminate waste, finds new and better ways of doing things. <i>Comments:</i>	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Improvement Needed <input type="checkbox"/> Not Applicable
7. Adherence to Policy - The extent to which the employees follows company policies, procedures and work conduct rules. Complies with and follows all safety rules and regulations, wears required safety equipment. <i>Comments:</i>	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Improvement Needed <input type="checkbox"/> Not Applicable
8. Lead (if applicable) - The extent to which the employee demonstrates proper judgment and decision-making skills when directing others. Directs work flow in assigned areas effectively to meet production / area goals. <i>Comments:</i>	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Improvement Needed <input type="checkbox"/> Not Applicable

Overall Performance - Rate employee's overall performance in comparison to position duties and responsibilities.

Outstanding Exceeds Expectations Meets Expectations Improvement Needed

II. COMPLETE ALL OF THE FOLLOWING SECTIONS

1. Accomplishments or new abilities demonstrated since last review: _____

2. Specific areas of needed improvement: _____

3. Recommendations for professional development (seminars, training, schooling, etc.): _____

Employee's Comments: _____

Discussed/reviewed with employee on: _____ Follow up requested/desired: YES No

Manager/Supervisor Signature: _____ Date: _____

Employee Signature: _____ Date: _____