

## **INSTRUCTIONS**

The word template introduced last year for performance reviews has been converted to an Adobe Form to simplify and streamline the process. Below are basic instructions for use when completing this form.

- 1) Percentages entered for each Performance Factor copy to the scoring grid at the bottom of the form.
- 2) Number at bottom of scoring grid (next to total) is a calculation of all percentages entered. The total for all percentages entered **must** equal 100.
- 3) The check boxes for each Performance Factor are weighted from (8) to (0) going from left to right.
- 4) The value corresponding to the box checked is entered in the appropriate rating field of the scoring grid. If more than one box is checked the value for the leftmost (highest) checked box will be entered in the scoring grid.
- 5) Because of the nature of calculations in Adobe Acrobat you **must** enter a character in either the **New Rate** or **Effective** box below the scoring grid and press enter for the last calculation to process. This character can be removed with no changes to the calculations.
- 6) **All cells in the scoring grid are calculated fields. Do not enter any information directly into these cells.**
- 7) We have tested the calculations in the scoring grid and all appear to be working properly, if you find something that seems incorrect please advise Human Resources.

**ANNUAL PERFORMANCE EVALUATION FORM**

EVALUATION PERIOD

FROM \_\_\_\_\_ TO \_\_\_\_\_

NAME

DEPARTMENT

DATE

**Please describe the major job duties/responsibilities to which the evaluation is based (no need to complete if the current job description is adequate and the most updated job description is on file in Human Resources ):**

*Instructions: Each factor below is divided into descriptive phrases indicating varying levels of performance. Evaluate each employee on those factors in relation to his/her position and the previously established evaluation factors/weights. For each evaluated factor place an X in the box that most closely describes your observation of the employee's performance over the evaluation period. Weighting is done in increments of 5%, for each factor evaluated based upon the importance of the factor to the position. No single factor should exceed 25%. Total weight for all factors must equal 100%. Supportive comments must be made for each of the factors.*

**Performance Factors**

**1. Quality of Work:** Ability to provide neat, accurate and thorough quality of work at an appropriate level based on understanding gained through experience, education and training. Adherence to policies and procedures, including safety.

\_\_\_\_\_ %

Always produces exceptional quality of work. Has comprehensive understanding of all duties and procedures and overall impact to operation.

Seldom makes errors. Produces high quality work. Thorough understanding of duties and procedures.

Makes an acceptable level of errors. Quality of work meets standards. Has good working knowledge of duties and procedures.

Work often needs review. Makes more errors than should based on job knowledge. Slow to grasp details.

Excessive errors and repetitive mistakes are made. Fails to grasp most job assignments after sufficient training.

**Comments:**

**2. Quantity of Work:** Ability to produce required volume of work in a timely manner.

\_\_\_\_\_ %

Produces an exceptionally high volume of work with speed and accuracy. Always does more than expected

Consistently produces a high quantity of work. A thorough and careful worker. Uses good time management skills.

Produces an average volume of work, sometimes more. Works steadily, uses time effectively.

Production slightly below average. Needs to increase the volume of work produced.

Productivity inadequate.

**Comments:**

---



---

**3. Operational Performance:** Ability to produce required financial metric/goal in a timely manner.

\_\_\_\_\_ %

Financial Metric/Goal performance exceeds expectations. Demonstrates excellent use of financial/forecast skills.	Consistently achieves Financial Metric/Goal objectives. Uses good forecast/financial skills.	Meets Financial Metric/Goal performance expectations. Works steadily, uses sound methods effectively.	Financial Metric/Goal performance below average. Needs to increase performance output and skills.	Financial Metric/Goal performance is inadequate.
--	--	---	---	--

---

**Comments:**


---



---

**4. Initiative:** Competency to start and complete assignments without specific directions; recognize problems and apply or suggest viable solutions; engage in professional growth activities.

\_\_\_\_\_ %

Continually identifies ways to improve job and department. Self-starter, seeks new duties, makes significant contributions to department and ASC.	Consistently recommends solutions to problems and for improvements to department and operations.	Exercises good judgment by recognizing problems and suggesting solutions; completes assignments independently.	Occasionally exercises good judgment and proceeds without specific direction; sometimes suggests solutions or alternatives to issues.	Puts forth minimum effort; rarely suggests solutions or alternatives.
---	--	--	---	---

---

**Comments:**


---



---

**5. Adaptability/Versatility:** Willingness to learn new tasks and adapt to change; establish priorities and handle various tasks simultaneously; ability to perform job under pressure or in critical situations.

\_\_\_\_\_ %

Exceptionally adaptable. Welcomes new situations positively and as a challenge. Outstanding performance under pressure.	Adjusts quickly to new situations. Eager to learn and try new things. Works very effectively under pressure.	Adaptable and willing to accept new duties or procedures. Able to handle a reasonable amount of pressure in critical situations.	Learns new tasks slowly and has some difficulty prioritizing and handling various assignments simultaneously. Does not work well under pressure.	Unable to learn new tasks. Resists change and cannot adjust from one job to another.
---	--	--	--	--

---

**Comments:**


---

**6. Cooperation/Relations:** Ability and willingness to cooperate with associates, supervisors and subordinates to accomplish job requirements and meet the customer needs to ensure the success of the organization.

\_\_\_\_\_ %

Substantial success in working with others; outstanding and an extremely valuable team member. Continually contributes to the success of the organization.	Promotes harmony in working with others, is a valuable team member and contributes to the success of the organization.	Gets along with others, is a team member and is interested in the success of the organization.	Cooperation with others is usually acceptable. Occasionally has difficulty; with some improvement needed.	Ineffective or uncooperative in working with others. Reluctant or unwilling to accept assignments.
--	--	--	---	--

**Comments:**

**7. Dependability:** The extent that the employee can be relied upon to complete work assignments well and on time; willingness to work when needed and conscientiousness with respect to attendance and punctuality.

\_\_\_\_\_ %

Always does more than expected on assigned tasks and completes early with no supervision.	Consistently completes tasks early and results are beyond expectations with limited supervision.	Takes care of necessary tasks and completes within established timelines with minimal supervision. Regular and full-time attendance.	Usually completes tasks timely, sometimes requires prompting and supervision. Frequent absences and poor punctuality.	Often requires prompting to complete tasks. Requires close supervision. Very erratic attendance and tardiness problems.
---	--	--	---	---

**Comments:**

**8. Communication Skills:** Ability to effectively transmit ideas, thoughts, and information clearly and concisely to others in oral and written form in a professional manner.

\_\_\_\_\_ %

Outstanding ability to communicate ideas and thoughts to others.	Consistently able to express ideas and thoughts to others in a clear and concise manner.	Usually organizes and expresses ideas and thoughts clearly and concisely.	Has difficulty communicating ideas and thoughts in some circumstances.	Unable to express ideas and thoughts clearly.
--	--	---	--	---

**Comments:**

**9. Supervision/Leadership Skills:** Ability to plan, organize and control work activities; train, motivate and maintain morale; evaluate performance and communicate at all levels.

\_\_\_\_\_ %

Exceptional ability to plan and control work activities. Respected by others and generates a high degree of cooperation. Exhibits a positive image and acts as a role model to others while improving morale.

Very effective in establishing priorities. Capable and consistent leader. Motivates others and consistently seeks ways to improve morale and present a positive image.

Motivates others and meets routine schedules. Is a good role model and helps maintain a positive morale.

Has some difficulty in planning ahead, motivating and developing others. Usually behind schedule; poor role model.

Unable to plan, delegate, and organize effectively. Does not exhibit positive morale or motivation.

**Comments:**

---

**General Comments on specific areas of achievement and/or areas needing improvement:**

---

**Recommended Action for Development and Goals for the next rating period:**

Supervisor's Signature	Date
------------------------	------

Department Head's Signature	Date
-----------------------------	------

Human Resources Signature	Date
---------------------------	------

**Employee Comments - This section should be used to provide feedback to your supervisor on what can be done to assist you in performing your job. For example training or equipment needed, safety issues, improvements to policies or procedures necessary, etc.**

**Comments:**

This performance evaluation has been completed to assist you in your job performance and development. Your signature does not necessarily imply that you agree with the comments or rating, but that your supervisor has reviewed the document with you.

Employee's Signature	Date
----------------------	------

<b>For Dept. Head Use Only</b>	<b>Current Rate:</b>	
1. Weight	Rating	=
2. Weight	Rating	=
3. Weight	Rating	=
4. Weight	Rating	=
5. Weight	Rating	=
6. Weight	Rating	=
7. Weight	Rating	=
8. Weight	Rating	=
9. Weight	Rating	=
Total		=
Merit Increase		

New Rate \_\_\_\_\_ Effective \_\_\_\_\_