

## PERFORMANCE EVALUATION

### Employee Information

Name: \_\_\_\_\_ Title: \_\_\_\_\_  
Hire Date: \_\_\_\_\_ Rate of Pay: \_\_\_\_\_ Evaluation Period: \_\_\_\_\_

### Supervisor Information

Name: \_\_\_\_\_ Supervised employee for: \_\_\_\_\_  
Title: \_\_\_\_\_ Date Completed: \_\_\_\_\_

### Rating Scale

The rating scale for Performance Review and Goal Planning is made up of five factors. Unsatisfactory, Needs Improvement, Meets Requirements, Exceeds Requirements, and Outstanding. Any factor rated Needs Improvement and Unsatisfactory MUST have a Performance Improvement Plan (PIP) attached.

If there have been any letters of commendation, unofficial performance evaluations or disciplinary action during the rating period, the supervisor should site these occurrences.

### Evaluation Categories

JOB KNOWLEDGE – knowledge of products, techniques, equipment, materials, skills and procedures.

- Outstanding:** Expert in job, has thorough grasp of all phases of job.
  - Exceeds Requirements:** Very well informed; seldom requires assistance and instruction.
  - Meets Requirements:** Understands and performs most phases of the job well; occasionally requires assistance.
  - Needs Improvement:** Limited knowledge to perform job, frequently requires assistance or instruction.
  - Unsatisfactory:** Lacks knowledge to perform job properly.
- \_\_\_\_\_
- \_\_\_\_\_

WORK PRODUCT – the quality and quantity of work produced by the employee.

- Outstanding:** Highest quality possible, final job virtually perfect; high volume producer, always does more than expected or required.
  - Exceeds Requirements:** Quality above average with very few errors and mistakes; work assigned is completed early or on time.
  - Meets Requirements:** Error rate is acceptable, and all work is completed timely.
  - Needs Improvement:** Is not as careful in checking work product for errors, which are frequent; work assigned is completed late or is only partially complete.
  - Unsatisfactory:** Has made frequent errors that are harmful to business operations; does not complete work.
- \_\_\_\_\_
- \_\_\_\_\_

DEPENDABILITY – faithfulness in coming to work, performing assigned duties and working scheduled hours.

- Outstanding:** Always regular in attendance and prompt; had no unscheduled absences during rating period.
  - Exceeds Requirements:** Consistently regular in attendance and prompt; unscheduled absences only in emergency.
  - Meets Requirements:** - Usually present and on time; rare unscheduled absences.
  - Needs Improvement:** Lax in attendance and/or reporting time, occasionally calls in to work without prior approval.
  - Unsatisfactory:** Often calls in to work resulting in excessive unscheduled absences; without sufficient reason and/or notice.
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COOPERATION – Willingness to work harmoniously with other in getting job done, readiness to respond positively to instructions and procedures.

- Outstanding:** Enthusiastic, energetic and always displays positive behavior; stimulates teamwork.
  - Exceeds Requirements:** Views team success as imperative to individual success; goes out of way to instill “teamwork” environment.
  - Meets Requirements:** Cooperative, gets along well with others; works at maintaining good working relationships
  - Needs Improvement:** Indifferent, makes little effort to cooperate or is disruptive to the overall team; rarely offers assistance to co-workers.
  - Unsatisfactory:** Displays negativity when working with others, projects attitude of superiority; not cooperative and frequently criticizes others.
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INITIATIVE AND CREATIVITY – The ability to plan work and to go ahead with a task without being told every detail, and the ability to make constructive suggestions.

- Outstanding:** Displays unusual drive and perseverance, anticipates needed actions; frequently suggests better ways of doing things,
  - Exceeds Requirements:** a self-starter, proceeds on own with little or no direction, progressive, makes some suggestions for improvement.
  - Meets Requirements:** Very good performance, shows initiative and creativity in completing task; often offers workable solutions to problems.
  - Needs Improvement:** Does not proceed on own, waits for direction, routine worker; occasionally comes to wrong conclusions and assumes things.
  - Unsatisfactory:** Lacks initiative, less than satisfactory performance, spends too much time focusing on other aspects of the job.
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CUSTOMER/CLIENT SERVICE - taking care of the customer's needs by providing and delivering professional, helpful, high quality service and assistance before, during, and after the customer's requirements are met.

- Outstanding:** Always follows through and finds the answers to any questions and reports back to the customer promptly; always maintains competent and professional demeanor; listens to client needs and meets them.
- Exceeds Requirements:** Answers all questions promptly and accurately; if unable to answer finds a co-worker that can, consistently maintains courteous and helpful demeanor, listens to client needs.
- Meets Requirements:** Usually maintains competent and professional demeanor, typically deals with clients in a courteous manner.
- Needs Improvement:** Gets annoyed with clients who ask a lot of questions; frequently forgets to follow through on client requests.
- Unsatisfactory:** Frequently rude and impolite; carries on personal conversations in person or on the phone while clients wait.

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JUDGEMENT – The extent to which employees make decisions which are sound, ability to base decisions on fact rather than emotion.

- Outstanding:** Uses exceptionally good judgment when analyzing fact and solving problems.
- Exceeds Requirements:** Above average judgment; thinking is very mature and sound.
- Meets Requirements:** Handles most situation very well and makes sound decisions under normal circumstances.
- Needs Improvement:** Uses questionable judgment at times, room for improvement.
- Unsatisfactory:** Uses poor judgment when dealing with people and situations.

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USE OF EQUIPMENT AND MATERIALS

- Outstanding:** Able to troubleshoot and solves all work related problems quickly and efficiently; quickly learns new equipment and software programs well enough to train other employees.
- Exceeds Requirements:** Quickly learns new equipment and software programs; uses queries and reports to maximize efficiency.
- Meets Requirements:** Takes good care of equipment and uses supplies efficiently; learns new equipment and software programs.
- Needs Improvement:** Doesn't heed warning messages on equipment; eventually learns new equipment and software programs.
- Unsatisfactory:** Caused damage to equipment through misuse and care failure; no desire to learn new equipment and software programs.

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## Rating Scale Chart

Summary of Performance Categories	Outstanding (5)	Exceeds Requirements (4)	Meets Requirements (3)	Needs Improvement (2)	Unsatisfactory (1)	Rating Total
Job Knowledge						
Work Product						
Dependability						
Cooperation						
Initiative and Creativity						
Customer/Client Service						
Judgment						
Equipment and Materials						
Total Ratings						

Total each rating using assigned values to calculate overall performance.

Overall Performance – Rate employee’s overall performance in comparison to duties and responsibilities.

Outstanding	Exceeds Requirements	Meets Requirements	Needs Improvement	Unsatisfactory
40 – 37	36 – 30	29 – 20	19 – 13	12 – 8

## Review and Development

- Accomplishments or new abilities demonstrated since last review: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_
- Area requiring improvement: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_
- Developmental Plans and Goals for next review: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_
- Recommendations for professional development: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_
- To what extent have previous plans been carried out? \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

## Signatures and Statements

Employee: I have reviewed this evaluation and have discussed it with my supervisor. My signature does not necessarily indicate my full agreement. I understand that I may indicate my reservations or disagreement with this rating in the space provided below or may request a review by a higher authority.

Employee signature: \_\_\_\_\_ Date: \_\_\_\_\_

Comments:

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Evaluator: I have reviewed this evaluation with the employee. My recommendation is written below in the comment section.

Evaluator's signature: \_\_\_\_\_ Date: \_\_\_\_\_

Comments:

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Owner: I have reviewed this evaluation and \_\_\_\_\_ I concur, \_\_\_\_\_ I do not concur, for reasons listed below. See comment section below.

Owner signature: \_\_\_\_\_ Date: \_\_\_\_\_

Comments:

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