

Employee Name: _____
Supervisor: _____
Review Period: _____

Title: _____
Reviewer: _____

SCOPE:

The purpose of the Performance Evaluation and Development Plan is to clarify expectations, set objectives and identify actions to maintain or increase employee effectiveness.

RESPONSIBILITIES:

Summarize major responsibilities and specific objectives:

RESULTS:

Describe specific accomplishments since the last review and as compared to established objectives:

PERFORMANCE FACTORS CHART:

Criteria	Description	Comments
Quality of Work	Accuracy, thoroughness and degree of care in work performed Adherence to established standards and policies	
Productivity	Amount or degree of work consistently achieved, as job assignment requires	
Attendance	Arrives and leaves according to established expectations. Provides notice when time off is needed in accordance with all applicable policies.	
Planning and Organization	Assess needs on an ongoing basis Sets priorities & develops a plan of action Uses resources effectively Meets deadlines	

Judgment and Decision Making	Maintains company & client confidentiality Identifies problems, causes & resolutions Act on/Implements decisions and evaluates outcome Makes sound & timely decisions/recommendations based on all factors and/or standards of practice	
Initiative and Reliability	Willingness to assume responsibility Ability to take prompt and proper action within scope of authority Planning of constructive ideas Degree of supervision/direction required	
Adaptability	Degree of flexibility and openness to change Acceptance and utilization of constructive criticism	
Leadership	Communicates skillfully with work group and other departments Demonstrates ability to achieve results by managing other and through personal example Ability to inspire in others a willingness and desire towards a common objective	
Communication	Ability to effectively express ideas and concepts, both verbal and written	
Teamwork	Work co-operatively with others and consider their ideas Establishes and maintains productive work relationships with all employees and clients	

PERFORMANCE SUMMARY/GENERAL OVERALL PERFORMANCE:

Give a summary and explanation considering indicators such as responsibility, results and performance factors in the comments below.

COMMENTS:

Reviewers Comments:

Employee Comments:

DEVELOPMENT PLAN AND OBJECTIVES FOR THE COMING QUARTER:

Establish a development plan and objectives with the employee for the coming quarter. The plan should include specific actions and training the employee can take to maintain or increase effectiveness and are the basis for the next performance evaluation.

Development Plan:

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MAJOR OBJECTIVES FOR THE NEXT QUARTER/TWO QUARTERS/YEAR:

Establish a major objective plan with the employee for the coming quarter. The objectives should include specific actions, plans, processes, procedures, training etc. The major objectives are what the employee intends to achieve and are the basis for the next performance evaluation.

Objectives:

ACKNOWLEDGMENT:

Reviewer Signature: _____

Date: _____

*Employee Signature: _____

Date: _____

**My signature indicates that my manager and I have discussed this evaluation.*