**PERFORMANCE EVALUATION FORM TEMPLATE**

|  |  |
| --- | --- |
| **Employee Name** |  |
| **Job Title** |  |
| **Department** |  |
| **Supervisor/Manager** |  |
| **Evaluation Period** |  |

**Part I – Instructions**

This form lists the criteria and competencies against which you will evaluate the employee. [Company name] considers these performance factors critical to the success of personal, departmental, and company goals. The criteria listed in this evaluation should accurately reflect the employee’s overall performance as it relates to the duties and expectations outlined in their job description.

Evaluate the employee in each section according to the table below. Be sure to add comments, thoughts, and observations, as these are important to the evaluation process.

|  |  |
| --- | --- |
| **BELOW EXPECTATION** | Consistently fails to meet job duties and expectations. Performs at a level demonstrably below requirement. Improvement is required immediately to maintain employment. |
| **MEETS EXPECTATION** | Performs job duties at a satisfactory level according to the job description, under normal supervision and direction. |
| **EXCEEDS EXPECTATION** | Often exceeds job requirements. Consistently meets goals and objectives; accomplishments made in areas outside regular job role. |

**Part II –Goals**

Identify key goals and objectives for the year (3-5 goals). Follow SMART plan guidelines and develop professional goals. Rate and add comments for each at the end of the year.

1. **Goal #1 [add details]**

*E.g. Improve customer service ratings by 10% by the end of the first quarter*

Manager’s assessment

☐ Below Expectations

☐ Meets Expectations

☐ Exceeds Expectations

Comment

*Add Comments*

1. **[ADD GOAL HERE]- repeat for any additional goals**

Manager’s assessment

☐ Below Expectations

☐ Meets Expectations

☐ Exceeds Expectations

Comments

*Add Comments*

**Part III - Competencies**

1. [Identify Competencies to measure your employees. Rate and add comments for each. For Management level positions, be sure to add competencies such as Leadership, Ability to Lead others, Managing a Team, Organization and Planning] Ideally, evaluate 2-4 competencies in a year.

e.g. *Knowledge, Skills and Ability – The degree to which the employee exhibits the knowledge, skills and ability required to fulfill their job responsibilities*

Manager’s assessment

Below Expectations

Meets Expectations

Exceeds Expectations

Comment

*Add Comments*

1. **[ADD COMPETENCY HERE]- repeat for any additional competencies**

Manager’s assessment

Below Expectations

Meets Expectations

Exceeds Expectations

Comments

*Add Comments*

**Part IV – Overall Performance**

To determine overall performance rating, refer to both goal completion and competency ratings.

Below Expectations

Meets Expectations

Exceeds Expectations

**Part V – Acknowledgement**

|  |  |
| --- | --- |
| Employee signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Manager signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |