

**PERFORMANCE EVALUATION AND COUNSELING FORM  
TECHNICAL PERSONNEL**

<hr/> <u>Employee Name</u>	<hr/> <u>Classification</u>	<hr/> <u>Supervisor/Reviewer</u>	
<hr/> <u>Evaluation Date</u>	<hr/> <u>Employment Date</u>		
<hr/> <u>Probationary Employee Six Month Review</u>	<hr/> <u>Probationary Employee Twelve Month Review</u>	<hr/> <u>Regular Employee Annual Review</u>	<hr/> <u>Other</u>

**INSTRUCTIONS**

Using the characters outlined below, compare the performance of the employee being rated against the performance criteria listed for each factor. Select the alpha which best indicates your perception of that individual's performance on each of the criterion and enter it in the box provided. Then enter an alpha indicating a composite, or overall evaluation for the factor. Your complete evaluation should not necessarily reflect an average of the criteria rating since some criterion are more important than others. Examples of past performance must be cited.

**EVALUATION SCALE**

- (O) Outstanding: Exemplary performance far exceeding performance criteria.
- (E) Exceeds Expectation: Performance exceeds level supervisor normally expects.
- (M) Meets Expectation: Generally meets supervisor's expectation on performance criteria.
- (B) Below Expectation: Erratic performance on criteria, falling short of that normally expected.....requires remedial attention.
- (U) Unsatisfactory: Unacceptable performance which must receive immediate attention.
- (NA) Not Applicable: Evaluation of the factor or criterion is inappropriate for the employee being rated.

**FACTOR A: SUPPORT OF WORK UNIT'S OBJECTIVES: PLANNING/TEAMWORK**

**Performance Criteria:**

- Works with supervisor & other members of office group in planning & building an effective team.
- Individual's goals, talents and efforts are directed toward the needs of the department and accomplishment of the work group.
- Improved work methods are suggested and readily tried to improve effectiveness and solve operational problems.
- New and additional assignments are accepted and performed.

**Composite Evaluation for Factor.**

Cite examples of past performance to support your evaluation. \_\_\_\_\_  
\_\_\_\_\_

**FACTOR B: APPLICATION OF TECHNICAL SKILLS**

**Performance Criteria:**

- Technical skills for performing assignments are either possessed or developed.
- Performance of assigned projects is consistent with currently accepted techniques, standards and procedures.
- Solutions developed are conceptually sound; technical problems in application are anticipated and resolved.
- Conclusion/recommendations are substantiated/documentated by available information.

**Composite Evaluation for Factor.**

Cite examples of past performance to support your evaluation. \_\_\_\_\_  
\_\_\_\_\_

**FACTOR C UTILIZATION, MAINTENANCE AND CARE OF TOOLS, EQUIPMENT AND SUPPLIES**

**Performance Criteria:**

- No down-time, loss or damage to equipment due to carelessness or negligence.
- Equipment wear and malfunctions are reported to supervisor or corrected as specified.
- Prescribed operator maintenance is performed on schedule.
- Equipment and tools are used correctly.

**Composite Evaluation for Factor.**

Cite examples of past performance to support your evaluation. \_\_\_\_\_

**FACTOR D: REGULARITY OF ATTENDANCE AND PUNCTUALITY**

**Performance Criteria:**

- Delays in starting work at specified time are rare.
- Does not abuse meal periods, coffee breaks, quitting time or special absences.
- Supervisor is given proper notice in advance of absences.
- Sick leave is not abused and is accumulated or use is verified as required.
- Requests for sick leave without pay are infrequent and based upon verified needs.

**Composite Evaluation for Factor.**

Cite examples of past performance to support your evaluation. \_\_\_\_\_

**FACTOR E: CONFORMANCE TO INSTRUCTIONS, WORK SCHEDULES, PERFORMANCE STANDARDS**

**Performance Criteria:**

- Instructions are followed; assignments/standards are met without close supervision.
- Deviations from established schedules/instructions are approved by supervisor or corrected.
- Work is of sufficient quality and quantity that little time is lost due to corrections or inadequate work output.
- Reasonable overtime is accepted and performed without complaint.

**Composite Evaluation for Factor.**

Cite examples of past performance to support your evaluation. \_\_\_\_\_

**FACTOR F: COMPLIANCE WITH SAFETY PROCEDURES AND REGULATIONS**

**Performance Criteria:**

- No accidents caused by careless or negligence performance.
- Safety rules and procedures are followed and safety equipment properly used.
- All accidents, safety hazards and unsafe acts are reported to supervisor upon occurrence.
- Work area (vehicle) and equipment are kept clean and orderly.

**Composite Evaluation for Factor.**

Cite examples of past performance to support your evaluation. \_\_\_\_\_

**FACTOR G: WORKING RELATIONSHIP WITH FELLOW EMPLOYEES AND SUPERVISORY PERSONNEL**

**Performance Criteria:**

- Problems or conflicts in working relationships are resolved.
- Needs, problems and procedures are communicated to affected parties.
- Personal contacts with the public demonstrate efficiency, competence and courtesy.
- Few and only minor problems occur because of inadequate communication and coordination of activities.

**Composite Evaluation for Factor.**

Cite examples of past performance to support your evaluation. \_\_\_\_\_

**FACTOR H: PREPARATION AND MAINTENANCE OF RECORDS ASSOCIATED WITH WORK ACTIVITIES.**

**Performance Criteria:**

- Records, work orders, etc. are accurately prepared on time and kept in neat order.
- Necessary information (oral/written) is communicated accurately and timely.
- Records, reports, etc., are rarely returned for correction.

**Composite Evaluation for Factor.**

Cite examples of past performance to support your evaluation. \_\_\_\_\_

**FACTOR I: ASSIGNMENT, TRAINING/OVERSEERING ASSIGNED PERSONNEL (LEAD POSITIONS ONLY)**

**Performance Criteria:**

- Unsatisfactory performance is recorded and reported to formal supervisor.
- Few and only minor misunderstandings of assignments occur.
- Feedback on performance is given in a fair and timely manner.
- On-the-job training needs are identified and met without regard to race and sex, in accordance with Equal Employment Opportunity requirements.
- Task assignments made in a fair manner and work evenly distributed among workers.

**Composite Evaluation for Factor.**

Cite examples of past performance to support your evaluation. \_\_\_\_\_

**FACTOR J: SELF-IMPROVEMENT ACTIVITY**

**Performance Criteria:**

- Reacts properly to counseling and suggestions for improvement.
- Resourceful in developing goals toward self improvement.
- Accomplishes goals and objectives established in previous evaluation.

**Composite Evaluation for Factor.**

Cite examples of past performance to support your evaluation. \_\_\_\_\_

**FACTOR K: OVERALL APPRAISAL**

- Outstanding: Exemplary performance far exceeding performance criteria.
- Exceeds Expectation: Performance exceeds level supervisor normally expects.
- Meets Expectation: Generally meets supervisor's expectation on performance criteria.
- Below Expectation: Erratic performance on criteria, falling short of that normally expected.....requires remedial attention.
- Unsatisfactory: Unacceptable performance which must receive immediate attention.

**Remedial Activities:** Actions which supervisor and employee have agreed upon to correct performance evaluation Below Expectation or Unsatisfactory.

**Development Activities:** Actions which supervisor and employee have agreed upon to further develop employee capabilities and to prepare for greater responsibility.

**Strengths & Weaknesses:** Comment briefly on employee's areas of greatest strength and value to the company and on the employee's shortcomings or weaknesses.

**Comments of Employee:**

\_\_\_\_\_  
Evaluator's Signature

\_\_\_\_\_  
Employee's Signature

Signature indicates only that evaluation has been reviewed with employee.

Dated: \_\_\_\_\_

Dated: \_\_\_\_\_