

Performance Appraisal System Evaluation Form Managers

Name:

Position Title:

Department:

Plan Date:

Annual Review Date:

PURPOSE OF PERFORMANCE APPRAISAL

- Enable **joint planning and communication** between a manager and a supervisor on what the manager is expected to accomplish.
- Ensure that a manager's performance is evaluated in terms of **measurable results** as well as how these results are achieved.
- Specify clear and explicit **performance measures**, jointly established by the manager and supervisor that are objective indicators of whether performance objectives are met.
- Promote **ongoing communication** between a manager and supervisor concerning what the manager is expected to accomplish, how well the manager is meeting these performance objectives, and what steps need to be taken by the manager and supervisor to ensure that the objectives are met.
- Identify a plan to promote the manager's **professional development** that can include educational and training opportunities.
- Identify **corrective action** needed to be taken by the manager and the supervisor in those instances where a manager has not accomplished a performance objective.
- Provide a basis for **recognizing exceptional performance**.
- Improve individual job performance and thereby increase the effectiveness of the department.

Performance Plan

Employee:

PRIORITY PERFORMANCE OBJECTIVES

The manager, together with the supervisor, will list the manager's performance objectives for the next twelve months in order of priority. Care should be taken that each objective states what the manager plans to accomplish, identifies one or more performance measures to determine whether each objective is accomplished, and specifies the target date for completion. (Attach additional pages, if necessary.)

KEY PERFORMANCE FACTORS

Whether a manager can accomplish the performance objectives depends in part on how effectively the manager performs the key functions listed below. A mutual understanding should be reached on expectations in each of these areas. Any specific or important agreements on performance expectations should be recorded below.

PLANNING & ORGANIZING:

PERSONNEL SUPERVISION:

DECISION MAKING:

CUSTOMER SERVICE (Internal & External)

COMMUNICATION OF INFORMATION (Written & Verbal):

POLICIES COMPLIANCE:

FINANCIAL MANAGEMENT:

Position	Signatures	Date
Manager	_____	_____
Supervisor	_____	_____
Reviewing Authority	_____	_____

Mid-Year Review

Employee:

In addition to informal discussions of progress, the manager and supervisor should review the progress in meeting the priority performance objectives at least once during the twelve month period. The purpose of this discussion is to assess progress against objectives, identify obstacles, determine appropriate actions, and if necessary, revise objectives. This session will also be used to assess the key performance factors.

PRIORITY PERFORMANCE OBJECTIVES

- 1. Status: Ahead of Schedule On Schedule Behind Schedule
Action Steps:
- 2. Status: Ahead of Schedule On Schedule Behind Schedule
Action Steps:
- 3. Status: Ahead of Schedule On Schedule Behind Schedule
Action Steps:
- 4. Status: Ahead of Schedule On Schedule Behind Schedule
Action Steps:
- 5. Status: Ahead of Schedule On Schedule Behind Schedule
Action Steps:

KEY PERFORMANCE FACTORS

	Satisfactory	Needs Improvement	Does Not Apply
Planning and Organizing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Personnel Supervision	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Decision Making	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer Service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication of Information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Policies Compliance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Financial Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments:

Signatures

Mid-Year Review

Manager _____ Date: _____

Supervisor _____ Date: _____

Reviewing Authority _____ Date: _____

Annual Review

Employee:

At the end of the twelve month period, the manager and supervisor will meet to determine whether each priority performance objective has been accomplished. The supervisor will also assess performance, after discussion with the employee, in terms of the key performance factors.

PRIORITY PERFORMANCE OBJECTIVES

- 1. Exceeded Accomplished Did Not Accomplish
Comments:
- 2. Exceeded Accomplished Did Not Accomplish
Comments:
- 3. Exceeded Accomplished Did Not Accomplish
Comments:
- 4. Exceeded Accomplished Did Not Accomplish
Comments:
- 5. Exceeded Accomplished Did Not Accomplish
Comments:

KEY PERFORMANCE FACTORS

	Exceeded	Accomplished	Did Not Accomplish
Planning and Organizing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Personnel Supervision	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Decision Making	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer Service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication of Information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Policies Compliance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Financial Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments:

Signatures

Annual Review

Manager _____

Date: _____

Supervisor _____

Date: _____

Reviewing Authority _____

Date: _____

*Signature does not necessarily indicate agreement with content.

Professional Development Plan**Employee:**

As a result of their discussion of the manager's performance at the annual review, the supervisor and the employee will develop a plan for promoting the employee's professional growth. This plan can include participation in a training or educational program or the opportunity to develop new skills through new work assignments.

DEVELOPMENT PLAN**Skills and Knowledge to be Developed:****Training/Educational Programs:****New Work Assignments:****CORRECTIVE ACTION STEPS**

If the manager did not meet one or more of the priority performance objectives, or needs improvement in a key performance factor, the supervisor should specify the corrective action steps that will be taken by the manager and the supervisor to improve performance.

Manager's Comments (if any):**Supervisor's Comments (if any):****Reviewing Authority Comments (if any):**

