**PERFORMANCE EVALUATION FORM TEMPLATE**

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

**Part I – Instructions**

This form lists the goals 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: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |