**SAMPLE ANNUAL PERFORMANCE EVALUATION FORM**

Name of Person Evaluated:

Manager’s Name:

Evaluation Period: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Title: Date:

**Performance Review Process**

1. Rate the person's level of performance, using the definitions below.
2. Review with employee, discussing strengths, areas for development, and any questions that may arise.
3. Give an overall rating in the space provided, using the definitions below as a guide.
4. Combine averages for each section for a total score.

**Performance Rating Definitions**

The following ratings must be used to ensure commonality of language and consistency on overall ratings: (There should be supporting comments to justify ratings of “Outstanding” “Below Expectations, and “Unsatisfactory”)

 5 Outstanding Performance is consistently superior

 4 Exceeds Expectations Performance is routinely above job requirements

 3 Meets Expectations Performance is regularly competent and dependable

 2 Below Expectations Performance fails to meet job requirements on a frequent basis

 1 Unsatisfactory Performance is consistently unacceptable

1. **Work Outcomes for the Coming Year**

List Your Three Key Goals/Outcomes for This Year:

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Professional Development and Mentorship Necessary to Progress on Your Three Key Goals for The Coming Year:

1. **Performance Factors**

1. **Work Behaviors**

|  |  |  |
| --- | --- | --- |
| **Growth and Learning Mindset** * Seeks out, welcomes, and takes advantage of all coaching, training, and other resources to gain mastery of position.
* Acknowledges and shares areas needing further development with others as appropriate, and zealously works to improve them.
* Remains open and positive when receiving direction, coaching, and feedback.
* Invested in others’ success
 | **Outstanding** | **5** |
| **Exceeds Expectations** | **4** |
| **Meets Expectations** | **3** |
| **Below Expectations** | **2** |
| **Unsatisfactory** | **1** |
| **NA** |  |
| **Communication** * Assures monthly check-in/coaching meetings with supervisor occur.
* Clarifies work priorities by asking questions/seeking guidance as needed.
* Keeps colleagues, co-workers, subordinates, customers and supervisor informed on work/project status, including problems.
* Chooses personal conversation over email as much as possible.
* Expresses ideas respectfully and clearly, both orally and in writing.
* Reviews all communication from Leadership and management to remain informed of important organizational news, events, business developments.
 | **Outstanding** | **5** |
| **Exceeds Expectations** | **4** |
| **Meets Expectations** | **3** |
| **Below Expectations** | **2** |
| **Unsatisfactory** | **1** |
| **NA** |  |
| **Interpersonal Skills / Teamwork / Problem Solving** * Works collaboratively with co-workers, supervisor, and customers.
* Establishes and maintains effective relationships both internally and externally.
* Asks others to share ideas and viewpoints.
* Tries to understand others’ reasoning when they disagree.
* Encourages discussion of tense or controversial topics.
* Works well with others in stressful or tense situations.
* Refrains from second-guessing the work or intent of others and avoids negative office gossip.
 | **Outstanding** | **5** |
| **Exceeds Expectations** | **4** |
| **Meets Expectations** | **3** |
| **Below Expectations** | **2** |
| **Unsatisfactory** | **1** |
| **NA** |  |
| **Decision Making** * Gathers information and perspectives from key stakeholders prior to making decisions.
* Analyzes data and information and reaches logical and appropriate conclusions.
* Makes timely decisions.
* Takes ownership for decisions.
 | **Outstanding** | **5** |
| **Exceeds Expectations** | **4** |
| **Meets Expectations** | **3** |
| **Below Expectations** | **2** |
| **Unsatisfactory** | **1** |
| **NA** |  |
| **Planning and Organization** * At outset of work, plans effectively by listing tasks and timeline for completion.
* Meets or exceeds deadlines without jeopardizing quality.
* Uses a calendaring system to effectively track appointments and organize work.
* Creates email folders, document folders, and physical files as necessary.
 | **Outstanding** | **5** |
| **Exceeds Expectations** | **4** |
| **Meets Expectations** | **3** |
| **Below Expectations** | **2** |
| **Unsatisfactory** | **1** |
| **NA** |  |
| **Customer Service*** Identifies customer needs and expectations and responds to them in a timely and effective manner.
* Anticipates and prevents delays or problems that can adversely affect the customer.
* Keeps customers informed of status of pending actions.
* Is courteous and professional in dealing with internal staff, external customers and vendors.
 | **Outstanding** | **5** |
| **Exceeds Expectations** | **4** |
| **Meets Expectations** | **3** |
| **Below Expectations** | **2** |
| **Unsatisfactory** | **1** |
| **NA** |  |
| **Initiative / Innovation** * Recognizes opportunities and initiates actions to capitalize on them.
* Looks for new and productive ways to make an impact.
* Acts as a catalyst for needed changes.
* Seeks out and takes on increasing responsibility.
* Resolves problems as they occur.

  | **Outstanding** | **5** |
| **Exceeds Expectations** | **4** |
| **Meets Expectations** | **3** |
| **Below Expectations** | **2** |
| **Unsatisfactory** | **1** |
| **NA** |  |

1. **Work Outcomes (insert from job description; lead po example here)**

|  |  |  |
| --- | --- | --- |
| **Goals and Objectives / Quality of Work** * Met annual performance Objectives
* Produces work that is highly accurate, demonstrates attention to detail and reflects well on the organization.
* Has a thorough understanding and working knowledge of all aspects of the position.
* Proficient in Xcel, Word, PowerPoint, and other related software.
* Proficient in all relevant internal systems and tools.
 | **Outstanding** | **5** |
| **Exceeds Expectations** | **4** |
| **Meets Expectations** | **3** |
| **Below Expectations** | **2** |
| **Unsatisfactory** | **1** |
| **NA** |  |
| **Project Management** * Develops high quality project plans.
* Strong implementation skills.
* Makes course corrections when appropriate.
* Evaluates project outcomes and performance and applies results for continuous improvement.
* Coordinates technical assistance and trainings.
* Oversees consultants’ work.
* Program area expertise.
 | **Outstanding** | **5** |
| **Exceeds Expectations** | **4** |
| **Meets Expectations** | **3** |
| **Below Expectations** | **2** |
| **Unsatisfactory** | **1** |
| **NA** |  |
| **Budget / Financial Management** * Creates and manages project budgets, stays within budget.
* Maintains appropriate financial reporting and control procedures.
* Ensures timely and accurate reporting to funders.
* Operates efficiently to maintain best cost.
 | **Outstanding** | **5** |
| **Exceeds Expectations** | **4** |
| **Meets Expectations** | **3** |
| **Below Expectations** | **2** |
| **Unsatisfactory** | **1** |
| **NA** |  |
| **Professional Profile*** Establishing strong external peer network.
* Developing into thought leader in program area(s).
* Increasing visibility in philanthropic community.
 | **Outstanding** | **5** |
| **Exceeds Expectations** | **4** |
| **Meets Expectations** | **3** |
| **Below Expectations** | **2** |
| **Unsatisfactory** | **1** |
| **NA** |  |

1. **Leadership and Management Skills [where appropriate]**

|  |  |  |
| --- | --- | --- |
| **Credibility/Role Model Behavior*** Acts in a trustworthy way.
* Demonstrates integrity and ethical behavior that is consistent with company policies and standards.
* Maintains energy and drive even during times of stress and anxiety.
* Fosters and maintains an environment of accountability, mutual respect and collaboration.
* Seeks feedback related to his/her areas of weakness and strength.
* Demonstrates flexibility and adapts to different situations.
* Gains respect and confidence of subordinates, supervisors, and peers.
* Works collaboratively with other leaders to improve overall organizational effectiveness and efficiency.
 | **Outstanding** | **5** |
| **Exceeds Expectations** | **4** |
| **Meets Expectations** | **3** |
| **Below Expectations** | **2** |
| **Unsatisfactory** | **1** |
| **NA** |  |
| **Strategic Management** * Communicates the long-term vision and strategies for the org. and where his/her group function fits with that future.
* Keeps the long-term vision and plan in mind when making operational decisions.
* Develops contingency plans to address potential outcomes.
* Engages in employee development initiatives.
 | **Outstanding** | **5** |
| **Exceeds Expectations** | **4** |
| **Meets Expectations** | **3** |
| **Below Expectations** | **2** |
| **Unsatisfactory** | **1** |
| **NA** |  |
| **Team Management*** Defines and communicates clear expectations and goals for team members.
* Ensures development of realistic work plans for staff.
* Ensures timely completion of quality work by staff.
* Delegates appropriately.
* Resolves competing priorities and roadblocks.
* Avoids favoritism.
* Conducts periodic team meetings to communicate status and direction.
* Gives people credit for their contributions and accomplishments.
* Ensures team celebrates accomplishments.
* Runs effective meetings.
* Handles conflict quickly and effectively.
* Shares information in a timely fashion.
* Evaluates staff and provides feedback on a consistent and regular basis.
 | **Outstanding** | **5** |
| **Exceeds Expectations** | **4** |
| **Meets Expectations** | **3** |
| **Below Expectations** | **2** |
| **Unsatisfactory** | **1** |
| **NA** |  |
| **Staff Development** * Contributes to core value of developing and promoting talent within the organization.
* Supports career planning with direct reports.
* Collaborates on a Development Plan with all direct reports and supports their execution.
* Invests in onboarding of new hires and re-boarding of new laterals by utilizing Onboarding Program, Training Plan, 90-day evaluation, 180-day evaluations.
* Meets with each direct report weekly to provide coaching and feedback on successes and challenges.
* Conducts after-incident reviews.
* Determines and addresses root causes of performance issues proactively.
* Encourages employees to develop additional skills and expertise through education, training, on-job experiences or special projects.
 | **Outstanding** | **5** |
| **Exceeds Expectations** | **4** |
| **Meets Expectations** | **3** |
| **Below Expectations** | **2** |
| **Unsatisfactory** | **1** |
| **NA** |  |

**B. Employee strengths and accomplishments:** Include those which are relevant during this evaluation period**.** This should be related to performance or behavioral aspects you appreciated in their performance.

**C. Performance areas which need improvement:**

**D. Plan of action toward improved performance:**

**E. Employee Comments**

**F. Signatures:**

Employee Date

(Signature does not necessarily denote agreement with official review and means only that the employee was given the opportunity to discuss the official review with the supervisor.)

Evaluated by Date

Reviewed by Date