

- Sample Form - Annual Performance Appraisal

This is an example form used by one of our customers. If you would like us to send you the editable Word document, please contact info@halogensoftware.com

Appraisal Score

Overall Score: / 5.0

EMPLOYEE INFORMATION

Name: **Job Title:**

Manager Name: **Department:**

Hire Date:  **Last Appraisal Date:** 

Evaluated By:

DEFINITION OF RATINGS

EXCEPTIONAL (5): Consistently exceeds all relevant performance standards. Provides leadership, fosters teamwork, is highly productive, innovative, responsive and generates top quality work. Active in industry-related professional and/or community groups.

EXCEEDS EXPECTATIONS (4): Consistently meets and often exceeds all relevant performance standards. Shows initiative and versatility, works collaboratively, has strong technical & interpersonal skills or has achieved significant improvement in these areas.

MEETS EXPECTATIONS (3): Meets all relevant performance standards. Seldom exceeds or falls short of desired results or objectives. Lacks appropriate level of skills or is inexperienced/still learning the scope of the job.

BELOW EXPECTATIONS (2): Sometimes meets the performance standards. Seldom exceeds and often falls short of desired results. Performance has declined significantly, or employee has not sustained adequate improvement, as required since the last performance review or performance improvement plan.


NEEDS IMPROVEMENT (1): Consistently falls short of performance standards.

INSTRUCTIONS

Describe the employee's contributions in each of the performance categories below. **It is IMPERATIVE that you illustrate specific, detailed examples since the last performance evaluation. Ratings MUST support and be substantiated by narrative comments.**

PERSONAL ATTRIBUTES (Matrix format)

Score: / 5.0 25 %

Competency	Ratings Scale	Comments:		Score /5.0
Quality Completes high quality work according to specifications. Thoroughly follows standards and procedures. Keeps complete records. Pays attention to details. Has a strong sense of quality and knows how to achieve it.				<input type="text"/> (0%)

Desire to Improve Quality Continually looks for ways to improve and promote quality. Applies feedback to improve performance.				<input type="text"/> (0%)
Job Knowledge Possesses skills and knowledge to perform the job competently.				<input type="text"/> (0%)
Communication Organizes and expresses ideas and information clearly, using appropriate and efficient methods of conveying the information.				<input type="text"/> (0%)
Interpersonal Skills Is sensitive to the needs, feelings and capabilities of others. Approaches others in a non-threatening and pleasant manner and treats them with respect.				<input type="text"/> (0%)
Conflict Resolution Expresses alternative points of view in a non-threatening way. Knows when it is appropriate to compromise and when it is important to take a stand.				<input type="text"/> (0%)
Teamwork Works on projects as part of a team, exchanging ideas and contributing skills that complement those of the other team members. Fulfills commitments to team members.				<input type="text"/> (0%)
Ethics Maintains high level of character and a professional attitude. Is able to conform and promote the company's standards of conduct.				<input type="text"/> (0%)
Initiative Strives to learn and improve. Seeks out ways to better themselves and the company. Takes on responsibilities. Does not remain idle – is hard working. Self-motivated.				<input type="text"/> (0%)

SUMMARY SCORE

PERSONAL ATTRIBUTES (Matrix format)	Score:	0.0	1.3	2.5	3.8	5.0
Quality						
Desire to improve quality						
Job Knowledge						
Communication						
Interpersonal Skills						
Conflict Resolution						
Teamwork						
Ethics						
Initiative						

PERSONAL ATTRIBUTES (Short format)

Employee Score:

Manager Score: / 5.0 25 %

Initiative

Employee Score:

Manager Score: / 5.0 (0%)

Works independently to solve problems.
Looks for opportunities to take on more responsibility.

- Exceptional
- Exceeds Expectations
- Meets Expectations
- Below Expectations
- Needs Improvement
- Not applicable

Self: N/A

Comments:

Development Plan:

Innovative Thinking

Employee Score:

Manager Score: / 5.0 (0%)

Looks for ways to improve effectiveness by implementing new ideas and more efficient approaches

- Exceptional
- Exceeds Expectations
- Meets Expectations
- Below Expectations
- Needs Improvement
- Not applicable

Self: N/A

Comments:

Development Plan:

Seeking Feedback

Employee Score:

Manager Score: / 5.0 (0%)

Proactively seeks performance feedback and identifies approaches to improve performance

- Exceptional
- Exceeds Expectations
- Meets Expectations
- Below Expectations
- Needs Improvement
- Not applicable

Self: N/A

Comments:








Development Plan:

PERSONAL ATTRIBUTES (Extended Matrix format)

Score: / 5.0 %

R = Ratings Scale 5 – Exceptional; 4 – Exceeds Expectations; 3 – meets Expectations; 2 – Below Expectations; 1 – Needs Improvement.

Rating	1 st Quarter	2 nd Quarter	3 rd Quarter	4 th Quarter	Score /5.0
	R	R	R	R	
Quality Completes high quality work according to specifications. Thoroughly follows standards and procedures. Keeps complete records. Pays attention to details. Has a strong sense of quality and knows how to	<input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2	<input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2	<input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2	<input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2	<input type="text"/> (0%)

achieve it.	<input type="radio"/> 1	<input type="radio"/> 1	<input type="radio"/> 1	<input type="radio"/> 1	
Comments: 					
Desire to Improve Quality Continually looks for ways to improve and promote quality. Applies feedback to improve performance.	<input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1	<input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1	<input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1	<input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1	<input type="text"/> (0%)
Comments: 					
Job Knowledge Possesses skills and knowledge to perform the job competently.	<input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1	<input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1	<input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1	<input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1	<input type="text"/> (0%)
Comments: 					
Communication Organizes and expresses ideas and information clearly, using appropriate and efficient methods of conveying the information.	<input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1	<input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1	<input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1	<input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1	<input type="text"/> (0%)
Comments: 					
Interpersonal Skills Is sensitive to the needs, feelings and capabilities of others. Approaches others in a non-threatening and pleasant manner and treats them with respect.	<input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1	<input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1	<input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1	<input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1	<input type="text"/> (0%)
Comments: 					
Conflict Resolution Expresses alternative points of view in a non-threatening way. Knows when it is appropriate to compromise and when it is important to take a stand.	<input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1	<input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1	<input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1	<input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1	<input type="text"/> (0%)
Comments: 					
Teamwork Works on projects as part of a team, exchanging ideas and contributing skills that complement those of the other team members. Fulfills commitments to team members.	<input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1	<input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1	<input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1	<input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1	<input type="text"/> (0%)
Comments: 					
Ethics Maintains high level of character and a professional attitude. Is able to conform and promote the company's standards of conduct.	<input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1	<input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1	<input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1	<input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1	<input type="text"/> (0%)

Comments: 					
Initiative Strives to learn and improve. Seeks out ways to better themselves and the company. Takes on responsibilities. Does not remain idle – is hard working. Self-motivated.	<input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1	<input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1	<input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1	<input type="radio"/> 5 <input type="radio"/> 4 <input type="radio"/> 3 <input type="radio"/> 2 <input type="radio"/> 1	<input style="width: 40px; height: 20px;" type="text"/> (0%)
Comments: 					

INSTRUCTIONS FOR NEW GOALS

Identify a minimum of two new objectives. These objectives must be those that the employee agreed to accomplish over the coming year and address any one of the following areas:

Project Goals are specific assignments to participate in or manage ongoing or future projects. When setting project oriented goals, outline the scope of the role the employee is to play, lists resources and completion time frame and define the desired result.

Enter additional goals (to a maximum of 5 in total) by clicking on the "Add New" button.

NEW GOALS

	Objectives	Weight
Title:		
	%	<input style="width: 40px; height: 20px;" type="text"/>
 	Due: <input style="width: 60px; height: 20px;" type="text"/>	
Action Items/Steps		
Measures of Success		
Title:		
	%	<input style="width: 40px; height: 20px;" type="text"/>
 	Due: <input style="width: 60px; height: 20px;" type="text"/>	
Action Items/Steps		

Measures of Success

 Add New...



INSTRUCTIONS FOR RATING PAST GOALS

Evaluate past goals by assessing the accomplishments achieved in each category. Enter additional past goals (to a maximum of 5 in total) by clicking on the "Add New" button.

Past goals that have been entered in the system can be accessed from the employee record using the "Copy from Clipboard" icon to the left of each goal field.

PAST GOALS

Employee Score:

Manager Score: / 5.0 25%

Goals	Accomplishments	Score	Weight
Title: <div style="border: 1px solid #ccc; height: 20px; margin-bottom: 5px;"></div> <div style="border: 1px solid #ccc; height: 40px; display: flex; align-items: center;"> <div style="border-right: 1px solid #ccc; flex: 1;"></div> <div style="border-right: 1px solid #ccc; flex: 1;"></div> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> Due: <input type="text"/> Completed: <input type="text"/> </div>		N/A <input type="text"/> /5.0	N/A <input type="text"/> %

Action Items/Steps

Accomplishments

Measures of Success

Accomplishments

Title: <div style="border: 1px solid #ccc; height: 20px; margin-bottom: 5px;"></div> <div style="border: 1px solid #ccc; height: 40px; display: flex; align-items: center;"> <div style="border-right: 1px solid #ccc; flex: 1;"></div> <div style="border-right: 1px solid #ccc; flex: 1;"></div> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> Due: <input type="text"/> Completed: <input type="text"/> </div>		N/A <input type="text"/> /5.0	N/A <input type="text"/> %
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Action Items/Steps

Accomplishments

Measures of Success

Accomplishments



 Add New...



PAST GOALS (NOT RATED)

Goals	Accomplishments
Title:	
<input type="text"/>	<input type="text"/>
 	
Due: <input type="text"/>	

Action Items/Steps	Accomplishments
<input type="text"/>	<input type="text"/>
Measures of Success	Accomplishments
<input type="text"/>	<input type="text"/>

Title:	
<input type="text"/>	<input type="text"/>
 	
Due: <input type="text"/>	

Action Items/Steps	Accomplishments
<input type="text"/>	<input type="text"/>
Measures of Success	Accomplishments
<input type="text"/>	<input type="text"/>

 [Add New...](#)

INSTRUCTIONS FOR DEVELOPMENT PLANS

Enter development plans to be worked on for the upcoming review period. Click on the "Select Development Plan" link to the left of the development field to choose from a list of available training courses/programs.

Click on the "Add New" button to add up to a total of 5 development plans.

Development Plan

Objectives

Title:




Title:




[Add New...](#)



EMPLOYEE COMMENTS

I agree with this evaluation I do not agree with this evaluation



MANAGER COMMENTS

Comments

