

Performance Evaluation Sheet

This performance evaluation sheet is recommended for use by all Managers and their staff.

Purpose: To review objectives;
 To set future objectives;
 To develop action plans;
 To identify training and experience needs

Each manager should study the format and then issue a copy to your respective staff member and arrange for a specific time to conduct the evaluation.

The evaluation is not meant to be a disciplinary tool but rather a situation where objectives and goals are jointly established and reviewed.

Checklist

1. Please conduct the evaluation only with the staff that report directly to you.
2. The main purpose is to monitor performance, set goals, training plans, and objectives. These will then form the basis of the review for the following year.
3. Issue performance evaluation document to incumbent.
4. Ask staff to read and prepare themselves for the meeting.
5. Arrange time, date and place of meeting with minimal interruptions.
6. Use Section A for the basis of discussions e.g. if manner rates a particular criteria (1) and incumbent rates (5), it would indicate there is a need for some discussion around this particular topic.
7. Contact me for any concerns you may have.

Romy George

Performance Evaluation Sheet

Name of Employee

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Department

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Job Title

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Reports To

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Date

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Performance evaluation is to be conducted as a combined exercise between employees and managers with sufficient time allowed for:

- adequate preparation
- meaningful interaction
- full and frank discussions
- resolution of problems
- development of action plans

SECTION A

(Behavioural criteria summary sheet)

	Criteria	N/A	Poor 0%	Not yet Competent 25%	Competent 50%	Very Good 75%	Exceptional 100%
1.	Planning of work and time management	0	1	2	3	4	5
2.	Meeting the required quantity of work	0	1	2	3	4	5
3.	Training and developing of subordinates	0	1	2	3	4	5
4.	Accuracy of work	0	1	2	3	4	5
5.	Potential for development	0	1	2	3	4	5
6.	Communication skills	0	1	2	3	4	5
7.	Technical and professional knowledge	0	1	2	3	4	5
8.	Dependability: Ability to be counted on to get the job done	0	1	2	3	4	5
9.	Initiative: Ability to accept responsibility and act independently	0	1	2	3	4	5
10	Co-operation: Ability to get along with and influence others	0	1	2	3	4	5

SECTION B

QUESTIONS

1. How do you see the work you do at present?

- Challenging
- Challenging at certain periods
- Not challenging enough
- Not challenging

2. How would you like to see your present job function, enriched or enlarged to make it more exciting to satisfy you?

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3. Are there any areas in your work that you need to improve on?

- Yes
- No
- Not applicable

4. Do you require any formal training or skills improvement courses in order to do so as well as aid you in career development?

- Yes
- No
- Not applicable

5. Should the answer to question 3 be yes, then please list the required training in the table below

Course	Projected date of completion

6. What type of experience and exposure would you like to acquire?

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7. Indicate your preference for the “next step” position that you would take in the Company if the opportunity existed?

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8. What are your career objectives?

Short term:

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Long term:

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9. What do you feel is your major achievement at work thus far?

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10. What developmental areas would you like to improve upon?

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Note: Please use the outcomes of these discussions to formulate a performance strategy for next year