

PERFORMANCE REVIEW

Name: _____	Employee Number: _____
Position: _____	Department: _____
Hire Date (Month/Day/Year): _____	Performance Period: ____/____/____ through ____/____/____

SECTION 1: REVIEW PAST PERFORMANCE

KEY ACCOMPLISHMENTS

Instructions: During the past year, you should have met with your manager several times to discuss your objectives, ongoing priorities and projects completed. Incorporate this information below, reflecting upon the key objectives you set, along with your progress and accomplishments to date.

Key Objectives / Responsibilities (Including Success Measures, Deadlines, etc.)	Progress and Accomplishments
Employee Comments (any additional information to emphasize / explain the above):	
Manager Comments (use this space to provide feedback on the Employee's progress and accomplishments against the stated objectives):	

SUMMARY RATINGS FOR KEY ACCOMPLISHMENTS

	Too New To Rate – As a result of being new to the company or position, there is not enough data to adequately assess the employee's performance. Any employee with more than three months tenure should be assessed.
	Did Not Meet Expectations – Regularly failed to meet objectives. Job performance has been below an acceptable standard. Deficiencies must be corrected and better performance attained in the future.
	Partially Met Expectations – Met some objectives. Required a lot of direction and coaching from manager.
	Fully Met Expectations – Consistently met all objectives. Required a moderate amount of direction and coaching from manager.
	Exceeded Expectations – Consistently met all objectives and often exceeded expectations. Required little direction and coaching from manager.

Superior Performance – Regularly exceeded objectives. Required little direction and coaching from manager.

VALUED WORK BEHAVIORS

Instructions: This company believes that practicing the Valued Work Behaviors will enable employees to be successful. Therefore, as part of the performance review, you will discuss your level of proficiency on Valued Work Behaviors relative to your Key Accomplishments. Your manager will later complete the “Manager Ratings” using the same scale, as well as provide explanatory comments and examples.

- **All Employees** should evaluate their performance on the **first 8 behaviors** (above the gray bar)
- **Managers Only** should evaluate their performance **on all 13 behaviors** (above AND below the gray bar)

TN= Too New; DNM = Did Not Meet Expectations; PM = Partially Met; FM = Fully Met; E = Exceeded; S = Superior Performance

ALL EMPLOYEES	Employee Ratings					Manager Ratings					
	DNM	PM	FM	E	S	TN	DNM	PM	FM	E	S
(1) Demonstrates Functional Competence - Understands expectations of job; Maximizes effectiveness by performing at or above expectations; ensuring functional and professional skills are continually upgraded and utilized											
(2) Cares for Customers & Partners - Treats internal and external customers and partners with care and respect; seeks to exceed their expectations											
(3) Demonstrates Teamwork - Places company and team goals ahead of individual priorities; works well with others; takes the appropriate action to minimize conflict											
(4) Communicates Effectively - Presents ideas in a clear, concise manner; listens to others; communicates actions and completes them.											
(5) Exhibits Analytical Ability, Solves Problems - Critically evaluates issues; takes appropriate action to design pragmatic solutions											
(6) Innovates - Improves results by generating, encouraging, and supporting new ideas											
(7) Demonstrates Agility - Responds quickly to new demands, priorities or changes in direction											
(8) Demonstrates Personal Leadership - Demonstrates high levels of productivity and quality; acts with integrity; treats co-workers with respect and dignity											
MANAGERS ONLY											
(9) Sets Direction/Strategy - Provides a clear sense of direction that focuses the department/group; develops a clear vision and strategy for achieving sustainable results; Recognized by team as the leader											
(10) Impacts and Influences Others - Successfully navigates within the organization by building broad support among key stakeholders											
(11) Builds Capability - Hires, develops and retains the talent necessary to execute; values and leverages diversity in building team											
(12) Motivates and Empowers Others - Encourages others to have a strong sense of excitement and ownership in their work; gives people the latitude to run their areas of responsibility											
(13) Coaches and Develops - Communicates performance expectations and provides frequent and constructive feedback; provides challenging opportunities for others to grow and develop											
Employee Comments (e.g., strengths, areas for improvement):											

Manager Comments (e.g., strengths, areas for improvement):

VALUED WORK BEHAVIORS – SUMMARY RATING

	Too New To Rate – As a result of being new to the company or position, there is not enough data to adequately assess the employee's performance. Any employee with more than three months tenure should be assessed.
	Did Not Meet Expectations – Does not exhibit VWB(s). Immediate improvement is necessary.
	Partially Met Expectations – Demonstrated VWB(s) below what is expected and required to be effective in position.
	Fully Met Expectations – Effectively and consistently demonstrated VWB(s).
	Exceeded Expectations – Demonstrates VWB(s) beyond what is required of the position.
	Superior Performance – This person defines the standard of the VWB(s) for their position. Seen as a role model by others.

PERFORMANCE REVIEW OVERALL RATING – KEY ACCOMPLISHMENTS AND VALUED WORK BEHAVIORS

Key Accomplishments Rating		Valued Work Behavior Rating	
	Too New To Rate – As a result of being new to the company or position, there is not enough data to adequately assess the employee's performance. Any employee with more than three months tenure should be assessed.		Too New To Rate – As a result of being new to the company or position, there is not enough data to adequately assess the employee's performance. Any employee with more than three months tenure should be assessed.
	Did Not Meet Expectations – Regularly failed to meet objectives. Job performance has been below an acceptable standard. Deficiencies must be corrected and better performance attained in the future.		Did Not Meet Expectations – Does not exhibit VWB(s). Immediate improvement is necessary.
	Partially Met Expectations – Met some objectives. Required a lot of direction and coaching from manager.		Partially Met Expectations – Demonstrated VWB(s) below what is expected and required to be effective in position.
	Fully Met Expectations – Consistently met all objectives. Required a moderate amount of direction and coaching from manager.		Fully Met Expectations – Effectively and consistently demonstrated VWB(s).
	Exceeded Expectations – Regularly exceeded objectives. Required little direction and coaching from manager.		Exceeded Expectations – Demonstrates VWB(s) beyond what is required of the position.
	Superior Performance – Accomplishments are exceptional and are recognizable as being superior to others.		Superior Performance – This person defines the standard of the VWB(s) for their position. Seen as a role model by others.

Manager (Print Name)

Manager's Signature

Date (Month/Day/Year)

Next Level Manager

Next Level Manager's Signature

Date (Month/Day/Year)

ACKNOWLEDGEMENT

By signing this form, I acknowledge that my manager has explained the rating and comments to me.

Employee Signature

Date (Month/Day/Year)

Employee Comments on Review:

SECTION 2: FOCUS ON THE FUTURE: THE GROWTH AND DEVELOPMENT ACTION PLAN

Instructions: Take a step back and think about next year. Where would you like to be? What skills do you hope to have? What position do you hope to be in? Take into account your Key Accomplishments and proficiency on the Valued Work Behaviors. What did you do well that you would like to do even better? What areas would you like to target for improvement? Based upon this list, choose **two to three** items you would like to concentrate your efforts for development over the next year.

Using the table below, develop an action plan outlining your development goals and how you plan to achieve these goals. Choose opportunities you have and provide a timeline for achieving your goals. If opportunities are not readily evident to you please work with you manager to identify opportunities.

EMPLOYEES ARE RESPONSIBLE FOR THEIR OWN GROWTH AND DEVELOPMENT PLAN

- You are expected to fill out the action plan below ***before*** meeting with your manager. Based upon your discussion, the action plan may be revised to reflect your manager's input.
- Revisit this action plan with your manager regularly (no less than every 6 months). Discuss what progress has been made and what opportunities you are still exploring. Amend goals, courses of action, and timeframes as necessary.

Development Opportunity	Action Steps and Timeframe	Goals / Success Measures	6 Month Checkpoint: Completed? On track?
Example: For Office Manager – Improve the tracking system	Example: Refine tracking system to ensure all departments have a clear picture of what is not at CS 1 week and 3 days in advance of an install	Example: Ensure all department managers have clear picture of what will be available 1 week in advance. Success Measure would be Managers are 100% aware of the order fulfillment at CS.	