# Performance review (year \_\_\_\_\_)

|  |  |  |
| --- | --- | --- |
| Employee name: | Employee job title: | Reviewer: |
| Employee ID: | Date review effective: | |

Reviewers and employees should keep this document close at hand and continually discuss and re-evaluate the objectives as appropriate throughout the year.

Assessment factors

Did not meet expectations: **Did not meet** all of the principal objectives/requirements of the position. May require additional training, guidance or time in the position to fully satisfy those objectives/requirements. Performance requires improvement.

Meets expectations: Generally **meets** the key objectives/requirements of the position. May exceed objectives/requirements in some areas and fall short in one or two others, but overall performance satisfies the needs of the job.

Exceeds expectations: **Exceeds** the key objectives/requirements of the position in most areas and **may far exceed** the expectations in some areas. Assumes additional responsibility and has demonstrated exceptional accomplishment.

Business objectives

|  |  |  |
| --- | --- | --- |
| **Beginning of the year:** Identify three to five of the main objectives being assigned for the review period and break it down into measurable components. Leave assessment blank until year-end. |  | **End of the year:** Indicate whether the employee **exceeded, met, or did not meet** these objectives, and explain your assessment. |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Define business objective | Specific milestones to be measured **(include begin and end dates)** |  | Assessment | Explanation |
| *Example:  Submit performance reviews on time* | 1. *Develop and draft meaningful business and development objectives for each staff member by May 1, 2015.* 2. *Discuss, agree and document all assessments according to guidelines, and submit by April 30, 2016.* |  | *Example:  Did not meet objective* | *While all documents were received, they were three weeks late, objectives were not aligned with the business strategy, and no development objectives were articulated, although there are obvious opportunities for development within the group.* |
|  | 1.  2.  3. |  | * **Exceeded** * **Met** * **Did not meet** |  |
|  | 1.  2.  3. |  | * **Exceeded** * **Met** * **Did not meet** |  |
|  | 1.  2.  3. |  | * **Exceeded** * **Met** * **Did not meet** |  |

Training and development plan

|  |  |  |
| --- | --- | --- |
| **Beginning of the year:** Based on the assessment of performance for last year, identify training and development objectives for the coming year. Break these down into measurable components to monitor results. **Any associated costs should be included in your budget for the coming year.** |  | **End of the year:** Indicate whether the employee **exceeded, met, or did not meet** these objectives, and explain your assessment. |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Define development objective | Specific milestones to be measured **(include begin and end dates)** |  | Assessment | Explanation |
| *Example:  Develop communication skills to the required level 3*  *Associated cost: None* | 1. *Participate in presenting the business case to senior management to obtain support for the investment by April 30, 15.* 2. *Debrief the experience to understand what went well, and where/how we could have improved our influencing ability.* |  | *Example:  Met objective* | *The employee spent spoke with me to understand the requirements and learn about the preferences/agendas of our audience. He then researched the issues required for the business case and worked with his mentor to determine how to “sell” the case. He prepared the business case thoroughly, anticipating and addressing some of the issues that would arise. He took on the prime responsibility of obtaining approval from the management team, with support from me on the tougher questions!* |
| Associated cost: | 1.  2.  3. |  | * **Exceeded** * **Met** * **Did not meet** |  |
| Associated cost: | 1.  2.  3. |  | * **Exceeded** * **Met** * **Did not meet** |  |

Assessment of core values

|  |  |  |
| --- | --- | --- |
| Examples | Assessment | Explanation, if required |
| *Dependability is about being where you’re expected to be, when you are expected to be there.* | * **Exceeds** * **Meets** * **Did not meet** |  |
| *Teamwork is about being supportive of others, pitching in or stepping up to help out when needed.* | * **Exceeds** * **Meets** * **Did not meet** |  |
| *Health and safety compliance is about following health and safety requirements at all times.* | * **Exceeds** * **Meets** * **Did not meet** |  |

Assessment summary

The assessment summary is a qualitative judgment based on the assessment of objectives and adherence to the organization’s core values. It sums up an employee’s overall contribution to the organization.

**Overall assessment:**

* Exceeds expectations
* Meets expectations
* Did not meet expectations

|  |
| --- |
| **Reviewer comments supporting the overall assessment**: |

|  |
| --- |
| **Employee comments:** *This assessment provides the employee and future readers of this document with a record of achievements during this review period. The employee is encouraged to comment.* |

**Signatures:** The employee and reviewer must sign the final document to acknowledge the discussion and agreement of the content and to commit to attaining the assigned objectives.

As the employee, your signature on this form indicates that you have read and discussed the contents with your reviewer, and that you understand how your performance will be assessed for the next year. As the reviewer, your signature indicates that you have prepared and discussed this assessment with the employee and you commit to support the employee in delivering to the objectives defined.

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# (Employee) (Reviewer)

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_