**Employee Performance Review**

**A Performance Review helps you as the employee to know how you have been doing and what further development or training you could do to improve.**

**Use the professional development plan following to outline your performance and your expected performance standards, objectives/goals as well as skills for improvement. Objectives are like goals to give you focus and direction in your position.**

**The aim is to discuss any weakness or problems and identify solutions with your supervisor together.**

Employee Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Position: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Reviewed by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signed by Employee: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Signed by Reviewer: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date of Review: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**This form will need to be completed prior to your meeting and then forwarded to your supervisor /Manager within 2 days of the review. You can complete it typing directly into the template (or print a copy). Once finalised a hard copy will be given to you and one kept on file**

**Score your own capability or knowledge in the following areas in terms of your current role requirements**

Employee to complete before the performance review

Give yourself a rating from 1 to 10 if 1=Unsatisfactory, 6 =Meets job requirement, 10=Exceeds job requirements or NA – if you don’t think it applies to you

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Performance Competencies** | **Rating** | **Comment** to be completed at the performance review | **Performance Competencies** | **Rating** | **Comment** to be completed at the performance review |
| **Communication Skills** |  |  | **Initiative** |  |  |
| Expresses ideas and thoughts verbally |  |  | Volunteers readily |  |  |
| Expresses ideas and thoughts in written form |  |  | Seeks increased responsibilities |  |  |
| Exhibits good listening and comprehension |  |  | Takes independent actions and calculated risks |  |  |
| Keeps others adequately informed |  |  | Looks for and takes advantage of opportunities |  |  |
| Selects & uses appropriate communication methods |  |  | Asks for help when needed |  |  |
| **Managing People (only complete if you manage staff )** | | | **Judgement** |  |  |
| Provides direction and gains compliance |  |  | Displays willingness to make decisions |  |  |
| Includes team members in planning |  |  | Exhibits sound and accurate judgement |  |  |
| Takes responsibility for team members’ activities |  |  | Supports and explains reasoning for decisions |  |  |
| Makes self available to team members |  |  | Includes appropriate people in decision making process |  |  |
| Provides regular performance feedback |  |  | Makes timely decisions |  |  |
| Develops team members’ skills & encourages growth |  |  | **Job Knowledge** |  |  |
| **Planning and Organisation** |  |  | Exhibits ability to learn and apply new skills |  |  |
| Prioritises and plans work activities |  |  | Keeps abreast of current developments |  |  |
| Uses time efficiently |  |  | Requires minimal supervision |  |  |
| Integrates changes smoothly |  |  | **Productivity** |  |  |
| Sets goals and objectives |  |  | Completes work in timely manner |  |  |
| Works in an organised manner |  |  | Strives to increase productivity |  |  |
| **Team work** |  |  | Works quickly |  |  |
| Exhibits objectivity and open to others views |  |  | Achieves established goals |  |  |
| Gives and welcomes feedback |  |  | **Quality** |  |  |
| Contributes to building a positive team spirit |  |  | Demonstrated accuracy and thoroughness |  |  |
| **Budgeting** |  |  | Displays commitment to excellence |  |  |
| Works within approved budget |  |  | Looks for ways to improve and promote quality |  |  |
| Develops and implements cost saving measures |  |  | Applies feedback to improve performance |  |  |
| Conserves organisational resources |  |  | Monitors own work to ensure quality |  |  |
| **Delegation** |  |  |  |  |  |
| Delegates work assignments |  |  |  |  |  |
| Matches the responsibility to the person |  |  |  |  |  |
| Sets expectations and monitors delegated activities |  |  |  |  |  |
| Provides recognition for results |  |  |  |  |  |

**Performance Assessment**

Employee to complete the first two columns prior to the performance review

|  |  |  |
| --- | --- | --- |
| **Objective**  List the goals/objectives you outlined to achieve in the previous 12 months as noted in your Performance Development Plan | **Assessment**  Explain how well you met the objectives you set last year  Did you meet the timeline?  Did it meet the proposed outcome?  Any comments eg constraints, improvements needed and proposed action | **Comment - reviewer assessment** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

Signed by Employee: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Signed by Reviewer: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_

**General Discussion Points**

Employee to complete before the performance review

1. What do you consider to be your most important achievements of the past year?
2. Has the past year been good/bad/satisfactory or otherwise for you, and why?
3. What elements of your job interest you the most, and least?
4. What elements of your job do you find most difficult?
5. What action could be taken by you to improve your overall performance?
6. What could your supervisor/manager or the organisation do differently that could further facilitate you achieving your objectives?
7. What kind of work or job would you like to be doing in two/five years time?
8. Are there any other work related issues you would like to raise?

**Performance and Development Plan**

In light of your current capabilities, your performance against past objectives, and your future personal growth and/or job aspirations, what activities and tasks would you like to focus on during the next year. Again, also think of development and experiences outside of job skills - related to personal aims, fulfilment, passions.

To be finalised at the performance review (please draft prior with an outline of any objectives you would like to achieve in the next 12 months).

|  |  |  |  |
| --- | --- | --- | --- |
| **Objective**  List the goals/objectives you would like to achieve in the next 12 months   * How will you go about achieving the objective * what results do you expect | **KPI**  what measure will demonstrate you achieved your objective | **Timelines**  when will the objective be achieved by | **Comments**   * Eg What are the expected outcomes/benefits * What support is being requested |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

Signed by Employee: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Signed by Reviewer: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Professional Development/Training**

List any professional development or training that you feel would help you achieve your performance development plan. This includes internal training, personal management, industry networking, conferences, seminars, memberships. Proposal to include approximate costs, and potential suppliers if external (keeping in mind budgetary, availability and authorisation considerations). To be finalised at the review but please note any suggestions and details prior to the review:

1.\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2.\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

3.\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

General comments – Employee

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

General comments – Supervisor/Manager

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

***Note:*** *This is a template only. Please customise the content to suit your organisation’s needs.*

***DISCLAIMER:*** *This template is intended as a general guide only.**JAM Creative, CircuitWest and its representatives accept no responsibility for the completeness or accuracy of any of the information contained in this document. Organisations should make their own judgments about this and seek expert advice if necessary. To the extent permitted by law, JAM Creative, CircuitWest and its representatives exclude all liability for loss or damage arising from the use of, or reliance on, the information contained in this document, whether or not caused by any negligence on the part of JAM Creative, CircuitWest and/or its representatives.*