

Employers Resource
Performance Management System: Performance Assessment
Check One: 90 Day Annual Other

Employee Name: _____ ERM: _____

Position/Job Title: _____ AGT: _____

Work Location: _____ Date of Hire: _____

Supervisor: _____ Date: _____

*****NOTE: Skip to #III for 90 Day Assessments*****

SELF ASSESSMENT

I) Please list the major areas of responsibility and rate yourself on each one:

5 = Performance was well beyond everyone's stated expectations

4 = Performance exceeded expectations

3 = Performance met what was expected

2 = Performance was below what was expected

1 = Performance was clearly unacceptable.

1. Responsibility: _____

Rating: _____

Comments: _____

2. Responsibility: _____

Rating: _____

Comments: _____

3. Responsibility: _____
Rating: _____
Comments:

4. Responsibility: _____
Rating: _____
Comments:

5. Responsibility: _____
Rating: _____
Comments:

II) Feedback on Areas of Responsibility

a) Which of the above listed items do you feel you excel in?

b) What strengths to you have that you do not feel are being used?

c) What can the company do to utilize these strengths?

d) Of the items listed above which one(s) do you feel need the most improvement?

e) What things can you do to make the needed improvements?

f) What can the company do to help you improve in these areas?

g) Are there any areas that you would like more training?

III) Goals and Objectives

a) List your key goals over the past appraisal period.

b) Which goals did you meet or exceed, explain?

c) Which goal achieved are you most proud of and why?

d) Which goal(s) did you not achieve and why?

e) What do you see as your goals for the next 6 months (and perhaps year, if applicable)?

IV) Workload

a) Please rate your current workload

_____ Too Heavy _____ Too Light _____ Just Right

b) What would you do to adjust it?

V) Please rate yourself on the following by circling your score, 1 being the lowest.

	Low									High
	1	2	3	4	5	6	7	8	9	10
Doing the Right Thing	1	2	3	4	5	6	7	8	9	10
Having an Attitude of Gratitude	1	2	3	4	5	6	7	8	9	10
Commitment to Long-Term Relationships	1	2	3	4	5	6	7	8	9	10
Having Fun	1	2	3	4	5	6	7	8	9	10

	Low					High				
Improving the Lives of Owners/Employees of America's Small Business	1	2	3	4	5	6	7	8	9	10
Company Core Values and Purpose Overall	1	2	3	4	5	6	7	8	9	10
Organized*	1	2	3	4	5	6	7	8	9	10
Supportive*	1	2	3	4	5	6	7	8	9	10
Collaborative*	1	2	3	4	5	6	7	8	9	10
Sociable*	1	2	3	4	5	6	7	8	9	10
Analytical*	1	2	3	4	5	6	7	8	9	10
Controlled*	1	2	3	4	5	6	7	8	9	10
Independent*	1	2	3	4	5	6	7	8	9	10
Attitude towards clients	1	2	3	4	5	6	7	8	9	10
Ability to accept change	1	2	3	4	5	6	7	8	9	10
Ability to accept criticism	1	2	3	4	5	6	7	8	9	10

Comments:

Submitted By: _____ **Date** _____
Employee's Signature

SUPERVISOR'S ASSESSMENT

Comments:

Agreed Upon Key Upcoming Goals/Objectives with Employee (what, when):

1)

2)

3)

Training/Staff Development Recommendation:

Supervisor's Signature: _____ **Date:** _____

Submitted to HR: _____ **Date:** _____

Definitions of Performance Factors (Denoted with an *)

Organized: Gets things done in an orderly, systematic, and procedural fashion. The position requires operational consistency and predictability; a strong ability to be organized and to stay focused on administrative detail and processes; minimizing mistakes because the consequences of error are unacceptable and too costly; and, establishing order and setting standards.

Supportive: Acts in a friendly and comfortable manner, demonstrates concern and assists others. The position requires the ability to put others at ease quickly; the ability to provide genuine support, assistance and help to others; friendly, cordial, and outgoing interactions; reducing conflict, tension, and anxiety so that relationships can be more productive; and, developing loyalty, trust and commitment from others.

Collaborative: Emphasizes cooperative partnering and team-oriented interactions. The positions requires a strong team effort which aligns all members with similar goals; accommodation of self-interest to the common good; compromise, negotiation and mutual give-and-take; team performance rather than individualism to complete a complex project; and, commitment to and identification with team goals.

Sociable: Relates to others using an engaging, expressive, and lively style. The position requires generating intensity, enthusiasm and excitement; encouraging and inspiring low-energy, unmotivated people; dramatic and exciting impact; generating greater emotional expressiveness in others; and, making the work fun and interesting.

Analytical: Uses logic to solve problems and anticipate long-term consequences. The positions requires a strong planning focus; the ability to anticipate possibilities and consequences; the ability to analyze and integrate diverse information and take a broad perspective; the ability to hold a future perspective and predict implications; and, a strong ability to think and solve problems.

Controlled: Displays an even temperament and maintains control over emotional reactions. The position requires remaining calm under pressure; projecting strength by avoiding emotional reactions; patience and the ability to prevent frustrations from showing; handling stress during tough times and being a calming influence on others; and, negotiating effectively by minimizing disclosure and not displaying emotions too openly.

Independent: Operates in a self-sufficient manner with a high degree of freedom and autonomy. The position requires self-sufficiency and personal responsibility; operating autonomously with few guiding support systems; conviction and courage in the face of dissent; independent decision making; and making things happen with few resources.