

## Annual Performance Review

Employee Name:	
Supervisor Name:	
Review Date:	

### Position Description

- Note: Attach a current position description. If applicable, make note of any significant changes since last year's performance review.

### Previous Review

- If performance outcomes were set at the last review, attach a copy of these outcomes and comment on the employee's progress

## Performance Competencies

### Scoring definitions

1 = Unsatisfactory	Performance consistently fails to meet minimum position requirements; employee lacks skills required or fails to utilize necessary skills.
2 = Inconsistent	Performance meets some, but not all position requirements.
3 = Proficient	Performance consistently meets position requirements.
4 = Highly Effective	Performance frequently exceeds position requirements.
5 = Exceptional	Performance is consistently superior and significantly exceeds position requirements.
NA = New / Not Applicable	Employee has not been in position long enough to have demonstrated the essential elements of the position and will be reviewed at a later agreed upon date.

### 1) **Technical Skills and Professional Knowledge**

Knowledge of the subject matter, relationships, tools, and specific knowledge required to do work efficiently and effectively. Shows ability and skill to focus on appropriate decision making. Displays an awareness of best practices and techniques required.

Unsatisfactory
  Inconsistent
  Proficient
  Highly Effective
  Exceptional
  NA

### 2) **Customer Approach**

Demonstrates clear understanding of the customer; anticipates and responds to the needs of our customers. Continually seeks to improve quality of our services through ongoing input and evaluation. Represents the company professionally to customers. Receives appreciation from the customers.

Unsatisfactory
  Inconsistent
  Proficient
  Highly Effective
  Exceptional
  NA

### 3) **Planning, Prioritizing and Organization**

Structures tasks, plans, and objectives logically and effectively; establishes priorities and sets goals; delegates or seeks help; ability to plan and schedule work effectively and efficiently to meet deadlines; ability to prioritize.

Unsatisfactory
  Inconsistent
  Proficient
  Highly Effective
  Exceptional
  NA

**4) Problem Solving and Follow-Through**

Has the ability to anticipate, identify and clearly define problems; evaluates and weighs alternatives; works effectively with organization to resolve issues and implements appropriate solutions. Ability to effectively take action on new initiatives, objectives, problem solutions, and projects to gain sought-after results.

Unsatisfactory  Inconsistent  Proficient  Highly Effective  Exceptional  NA

**5) Communication**

Communicates effectively with Customers, supervisor and peers.

Verbal – clearly communicates ideas, information, proposals, instructions, issues and questions using appropriate tone and language.

Written – produces clear, concise memos, email, etc. that convey all relevant information using appropriate language.

Unsatisfactory  Inconsistent  Proficient  Highly Effective  Exceptional  NA

**6) Reliability, Dependability and Self Accountability**

Willingness to accept and ability to fulfill responsibilities and to meet deadlines. Reliability and consistency of work product. Attendance and punctuality.

Holds self accountable for assigned responsibilities; sees tasks through to completion in a timely manner. Supports to department's decisions and goals.

Unsatisfactory  Inconsistent  Proficient  Highly Effective  Exceptional  NA

**7) Ability to identify opportunities and propose solutions**

Ability to identify customer opportunities and match with company solutions as a trusted advisor or resource to the customer. Ability to propose and negotiate.

Unsatisfactory  Inconsistent  Proficient  Highly Effective  Exceptional  NA

**8) Initiative and Independent Work**

Seeks opportunities for proposing and implementing activities, policies, programs that proactively help achieve goals. Ability to work independently.

Unsatisfactory  Inconsistent  Proficient  Highly Effective  Exceptional  NA



9) **Interpersonal Skills and Teamwork**

Proactively builds a positive working relationship with others. Displays enthusiasm when working and interacting with internal team members and outside stakeholders. Listens carefully, avoid faulting others and understand the situation before act.

Unsatisfactory  Inconsistent  Proficient  Highly Effective  Exceptional  NA

10) **Professional Development**

Maintaining and updating professional certifications. Assuming and fulfilling Position Description roles in different areas. Reflects professional value on customer interactions and any other related work.

Unsatisfactory  Inconsistent  Proficient  Highly Effective  Exceptional  NA

11) **Adaptability and Judgement**

Demonstrates willingness to meet changing conditions, to try new skills or difficult tasks. Ability to make fair and thoughtful decisions and act accordingly.

Unsatisfactory  Inconsistent  Proficient  Highly Effective  Exceptional  NA

**ADDITIONAL PERFORMANCE COMPETENCIES FOR EMPLOYEES WITH SUPERVISORY RESPONSIBILITIES ONLY****12) Leadership and Resiliency**

Anticipates and effectively manages change. Ability to guide the team with positive attitude and clear directions; Ability to act calm in difficult situations and to resolve the issues with positivity.

Unsatisfactory  Inconsistent  Proficient  Highly Effective  Exceptional  NA

**13) Resource Allocation**

Supervisory role on projects on your team. Prepares and manages project budgets and work effectively. Ability to monitor and foresee problems and make adjustments where necessary. Uses company resources (equipment, money, time, people, etc.) wisely.

Unsatisfactory  Inconsistent  Proficient  Highly Effective  Exceptional  NA

**14) Individual and Team Development**

Continually upgrades the quality of the people in organization through selection, coaching, empowerment, motivation, training and performance management.

Unsatisfactory  Inconsistent  Proficient  Highly Effective  Exceptional  NA

**15) Fairness and Delegation**

Displays fairness towards all subordinates; Delegates responsibility where appropriate, based on employee's ability and potential.

Unsatisfactory  Inconsistent  Proficient  Highly Effective  Exceptional  NA

**16) General Management**

Takes timely and appropriate corrective/disciplinary actions with employees. Identifies performance expectations, provides timely feedback.

Unsatisfactory  Inconsistent  Proficient  Highly Effective  Exceptional  NA

## Performance Summary

- List all aspects of employee's performance that contribute to their effectiveness.
  
- List aspects of employee's performance that require improvement for greater effectiveness.
  
- In what way is the employee ready for increased responsibility? What additional training will they need to be successful?

## Goal Setting and Development Planning

- List the employee's performance goals for the coming year.  
Goals should be SMART (Specific, Measurable, Aligned, Realistic, Time-bound)
  
- List the employee's development goals for the coming year.  
Goals should be SMART (Specific, Measurable, Aligned, Realistic, Time-bound)
  
- In the coming year, how will you provide guidance and assistance for the employee to accomplish their goals?

This annual performance review will become part of your dedicated personnel file.  
Please sign below to acknowledge that you have received this document.

<b>Employee Signature:</b>		<b>Date:</b>	
<b>Supervisor Signature:</b>		<b>Date:</b>	