

SAMPLE COMPLETED PERFORMANCE REVIEW FORM

Employee name: Terry Jones

Position: Marketing Manager

Supervisor name: Meredith Smith

Department: Marketing

Date for completion (listed below)

Self-assessment by employee: November 15, 2013

Review and completion by supervisor: December 5, 2013

Supervisor instructions: Please give this form to each of your employees no later than November 1 and ask the employee to complete and return his/her self-assessment to you by November 15. Upon receipt of the employees self-assessment, complete your section and return it to Human Resources by December 5.

Employee instructions: Please complete and return your self-assessment to your supervisor by November 15. Feel free to discuss any questions you have with your supervisor or with Human Resources.

Rating scale:

- 1 Unacceptable (fails to meet standards)
- 2 Needs improvement (frequently fails to meet standards)
- 3 Satisfactory (generally meets standards)
- 4 Outstanding (frequently exceeds standards)
- 5 Excellent (consistently exceeds standards)

SECTION 1: Performance of Key Job Duties

Employee instructions: Please review the attached copy of your job description. Make any needed revisions on the copy and rate your performance of the key job duties below.

Supervisor instructions: Please review the attached copy of the employees job description and any employee revisions. Make any additional changes on the copy and rate the employees performance of the key job duties below.

Rating on a scale of 1-5

Employee: 5

Comments: I have now held this position for three years. I perform all my key job duties at the highest level.

Supervisor: 5

Comments: Terry performs all the key job duties at a very high level.

SECTION 2: Completion of Annual Goals

Specific goals for 2013 were:

1. Increase marketing revenue by 20% over previous year

Rating on a scale of 1-5

Employee: 3

Comments: This was a very high goal! According to results as of the first of November, our marketing revenue was 15% over last years. I attributed this shortcoming to a general downturn in our industry as well as unavoidable turnover in the Marketing Department and lack of experienced staff.

Supervisor: 4

Comments: Although the year-to-date marketing revenue is not 20% above last years, we still have two more months to go and revenue is looking good for these last two months of the year. There was unavoidable turnover in the Department and Terry worked extraordinarily long hours to cover the staffing shortages.

2. Recruit and train two marketing assistants

Rating on a scale of 1-5

Employee: 2

Comments: Due to staffing shortages and lack of time to focus on recruitment and training, I did not meet this goal. I did hire one marketing assistant last month and am still in the process of training this individual. We are still recruiting for a second marketing assistant.

Supervisor: 2

Comments: This goal unfortunately was not met. Terry needed to set a higher priority on recruitment so that the Department would be adequately staffed. I offered to outsource the recruitment but this offer was declined. Terry needs to give a lot of attention to filling vacant positions and training new hires during the last part of this year and next year.

3. Work with website designer and content contributors to assure that all content meets marketing standards

Rating on a scale of 1-5

Employee: 5

Comments: I started working closely with our website designer and all content contributors this year. This result has been more revenue coming from our website and a more focused and consistent marketing approach.

Supervisor: 5

Comments: There has been enormous improvement in this area, due to Terry's thorough and focused work on the website content. Well done, Terry!

SECTION 3: General Performance Requirements

Quantity of Work

(The quantity of work produced and the promptness with which it is completed)

Rating on a scale of 1-5

Employee: 5

Comments: The quantity of work I produce is at the highest level. I consistently put in very long hours each day and often work weekends and holidays.

Supervisor: 5

Comments: Terry is a very hard worker. I recognize the long hours spent in this job and hope that with vacant positions filled shortly, these will no longer be necessary.

Quality of Work

(The ability displayed and accuracy of work produced, meeting company standards, neatness)

Rating on a scale of 1-5

Employee: 5

Comments: The quality of the work I produce is at the highest level. Finished products are usually error-free, thus avoiding costly reprints and time delays.

Supervisor: 4

Comments: Terry's quality is high but there have been some errors which went all the way to print. More focus needs to be given to final proofreading and to my suggestion that final proofing and editing be outsourced instead of being done in-house.

Knowledge of Job

(Basic knowledge and equipment necessary to do the job)

Rating on a scale of 1-5

Employee: 5

Comments: I have the knowledge and equipment needed to perform my job.

Supervisor: 5

Comments: Terry possesses the knowledge and skills to perform the job at a very high level. The Department has state-of-the-art equipment and computer hardware and software.

Dependability

(Amount of supervision required, punctuality and attendance)

Rating on a scale of 1-5

Employee: 5

Comments: I can always be depended upon to perform my job and help others perform theirs. My punctuality daily and at meetings and attendance is good.

Supervisor: 4

Comments: Terry is very dependable. But there have been problems with showing up late at management meetings. Being at our meetings when they start is important!

Teamwork

(Willingness and cooperativeness with co-workers and supervisors, ability to accept constructive criticism)

Rating on a scale of 1-5

Employee: 4

Comments: In my eagerness to complete work on a timely basis and well, I sometimes am not the best team player. I also realize that I often do not fully welcome my supervisors suggestions, such as outsourcing recruitment and proofreading and editing.

Supervisor: 3

Comments: Terry needs to work on being a better member of our team and needs to be more receptive to trying ideas presented to her in an effort to help perform the job better.

Adherence to Policy

(Adherence to policies and procedures)

Rating on a scale of 1-5

Employee: 4

Comments: I adhere to company policy very well but feel that we managers need to have more input on what our policies are.

Supervisor: 4

Comments: Terry does follow policy well. I agree that we need a more participative management style at the company and this will be one of my goals for next year.

Attitude

(The demeanor used in dealings with customers, co-workers and supervisors)

Rating on a scale of 1-5

Employee: 5

Comments: I have excellent relationships with our clients and vendors and am working to have the same with my co-workers and supervisor.

Supervisor: 4

Comments: Terry does get along exceedingly well with our clients and vendors. I am constantly receiving commendation from them! As noted above, more attention needs to be given to working well with coworkers and with me.

Initiative

(The degree to which an employee searches out new tasks and expands abilities professionally and personally)

Rating on a scale of 1-5

Employee: 3

Comments: Although this is an area I feel I could excel in, due to time constraints (lack of staff this year), I have not taken as much initiative as I would like to have taken. This will be one of my goals for next year.

Supervisor: 3

Comments: As one of our managers, Terry does need to take more initiative to broaden the scope of her job and her contribution to our company. I will work with her next year to make sure this improves.

SECTION 4: Overall Rating

Rating on a scale of 1-5

Employee: 4

Comments: In summary, I think I am performing at an outstanding level. I recognize that there are areas for improvement and look forwarding to working on these.

Supervisor: 4

Comments: Terry is definitely an above-average, outstanding employee. With focus on areas needing improvement, performance could be at the highest level in all areas.

SECTION 5: Recommendations for improvement/career development

Employee: Next year I would like to attend an executive management course to help with my general management skills and with building a better team environment in my department as well as becoming a better team member in the company. I also hope to complete my master's degree under our tuition assistance program.

Supervisor: Attendance at an outside management course will be beneficial to Terry and I will support this expenditure. Completion of a master's degree will also help in career progression at our company.

SECTION 6: General Comments and Signatures

Employee Comments: I appreciate the opportunity for this performance review and the support and direction my supervisor has given this year. I look forward to working with my supervisor and at this company for many years to come.

Employee signature: _____

Date: _____

Supervisor Comments: Terry is an outstanding employee whose contributions we appreciate and look forward to.

Supervisor signature: Date:

Human Resources signature:

Date:

Copies:

Personnel File

Employee

Supervisor