

Performance Appraisal Form Template

Directions: This template has been created in modular format so that you can easily 'copy and paste' into your existing performance appraisal form or you can create a new one. Simply highlight any of the tables, copy and then paste into your document.

Related documents: Sample Completed Performance Appraisal Form.doc
Employee Competency Self-Assessment Form.doc

The performance appraisal form template consists of four parts:

1. Setting objectives
2. Job specific competencies
3. Development plan
4. Overall Performance Rating

Part 1. *Setting Objectives:* The first part will allow the manager to set performance objectives for the year. Each objective set should have the ability to be measured. When reviewing the objectives at the appraisal meeting the manager needs to determine if the objective has been met and what rating will be applied. The example provided in the template is a scale of 1 to 4 (1 = Unsatisfactory and 4 = Outstanding). You can modify the scale to suit your organizations needs.

Part 2. *Job Specific Competencies:* The manager will need to transfer the items from a job specific competency model into this section. The manager will then look at each skill and ability and determine the rating for the employee. At the same time, the employee will be required to fill out the 'Employee Competency Self-Assessment Form'. Once the manager has completed rating the employee and has received the employee's self-assessment, they can tally the totals and compare scores. During the review, a discussion of the ratings can be conducted and necessary changes to the scores can occur.

Part 3. *Development Plan:* The development plan is an opportunity to address the competency gaps identified in Part 2 and to develop a plan of action to improve in specific areas. Additional professional development opportunities linked to improving competencies can also be included here.

Part 4. *Overall Performance Rating:* This section will sum up the overall ratings for the employee. Transfer the Total Rating from **Part One** and the Total Rating from **Part Two** into the appropriate column. If each of the sections is of equal importance, indicate that by multiplying each score by 50% (.5). However, if they are not of equal importance, apply the appropriate weighting as necessary. Finally add the two scores to get the employee's Overall Performance Rating.

Standard Form Information

Program:		Location:	
Name:		Position:	
Period Covered:	Time in Present Position:	Length of Service:	
Appraisal date:		Appraiser:	

Part One: Setting Objectives

4 = Outstanding 3 = Above Standard 2 = Satisfactory 1 = Unsatisfactory			
Objective	Measurement	Result Achieved (yes/no/partial)	Rating
Objective #1 (Enter objective here)			
Objective #2 (Enter objective here)			
Objective #3 (Enter objective here)			
Objective #4 (Enter objective here)			
Objective #5 (Enter objective here)			
Objective #6 (Enter objective here)			
TOTAL RATING PART ONE (Add all ratings and divide total by number of Objectives)			

Part Two: Job Specific Competencies

4 = Outstanding 3 = Above Standard 2 = Satisfactory 1 = Unsatisfactory								
Competency (Enter Title of Competency Here)	Rating				Score	Competency Rating (Take total score and divide by the number of Skills and Abilities)		
	1	2	3	4				
1. Enter Skills & Abilities from Competency model here	1	2	3	4				
	1	2	3	4				
	1	2	3	4				
	1	2	3	4				
	1	2	3	4				
	1	2	3	4				
	1	2	3	4				
	1	2	3	4				
	1	2	3	4				
	1	2	3	4				
Total Score								

Competency (Enter Title of Competency Here)	Rating				Score	Competency Rating (Take total score and divide by the number of Skills and Abilities)		
	1	2	3	4				
1. Enter Skills & Abilities from Competency model here	1	2	3	4				
	1	2	3	4				
	1	2	3	4				
	1	2	3	4				
	1	2	3	4				
	1	2	3	4				
	1	2	3	4				
	1	2	3	4				
	1	2	3	4				
	1	2	3	4				
Total Score								

Competency (Enter Title of Competency Here)	Rating				Score	Competency Rating (Take total score and divide by the number of Skills and Abilities)		
	1	2	3	4				
1. Enter Skills & Abilities from Competency model here	1	2	3	4				
	1	2	3	4				
	1	2	3	4				
	1	2	3	4				
	1	2	3	4				
	1	2	3	4				
	1	2	3	4				
	1	2	3	4				
	1	2	3	4				
	1	2	3	4				
Total Score								

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Competency (Enter Title of Competency Here)	Rating				Score	Competency Rating (Take total score and divide by the number of Skills and Abilities)
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1. Enter Skills & Abilities from Competency model here	1	2	3	4		
	1	2	3	4		
	1	2	3	4		
	1	2	3	4		
	1	2	3	4		
	1	2	3	4		
	1	2	3	4		
	1	2	3	4		
	1	2	3	4		
	1	2	3	4		
	1	2	3	4		
	1	2	3	4		
	1	2	3	4		
Total Score						

Competency (Enter Title of Competency Here)	Rating				Score	Competency Rating (Take total score and divide by the number of Skills and Abilities)
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	1	2	3	4		
	1	2	3	4		
	1	2	3	4		
	1	2	3	4		
	1	2	3	4		
	1	2	3	4		
	1	2	3	4		
	1	2	3	4		
	1	2	3	4		
	1	2	3	4		
	1	2	3	4		
	1	2	3	4		
Total Score						

Competency (Enter Title of Competency Here)	Rating				Score	Competency Rating (Take total score and divide by the number of Skills and Abilities)
	1	2	3	4		
1. Enter Skills & Abilities from Competency model here	1	2	3	4		
	1	2	3	4		
	1	2	3	4		
	1	2	3	4		
	1	2	3	4		
	1	2	3	4		
	1	2	3	4		
	1	2	3	4		
	1	2	3	4		
	1	2	3	4		
	1	2	3	4		
	1	2	3	4		
	1	2	3	4		
Total Score						

COMPETENCY TOTALS					4 = Outstanding 3 = Above Standard 2 = Satisfactory 1 = Unsatisfactory
Competency	Manager Rating	Employee Rating	Difference	Final Rating	Supervisor's Reason for Final Rating (If Any)
1.					
2.					
3.					
4.					
5.					
6.					
7.					
Total					
Add Individual ratings and divide by the number of competencies				Total Rating Part 2	

Part Three: Development Plan

Development Objectives and Professional Growth Interests	Recommended Action	Targeted Competency	Target Dates