

PERFORMANCE PLANNING AND APPRAISAL GUIDELINES

This performance planning and appraisal form provides a summary of the critical job functions and expected standards of performance, thus enabling supervisors to accurately and objectively measure the employee's performance level for each function.

Name:	Job Title:	Grade:
Reports to:	Job Title:	
Chairman/ Director:		
Department:	Evaluation Period:	
Date:	Performance Appraisal Score: <i>(from end of form)</i>	Calculated Field
I. JOB SUMMARY & SCOPE		
In one paragraph describe the basic function, summarizing the job-related functions. This summary should provide an overall picture of the job and give the primary reason for its existence.		
5 = Outstanding	4 = Exceeds Expectations	3 = Meets Expectations
2 = Below Expectations	1 = Unacceptable	
II. CRITICAL FUNCTIONS & ACCOUNTABILITIES *		
What specific responsibilities & duties is the employee expected to perform during the review period?	EXPECTED STANDARD / OUTCOME	WEIGHTING % (Weighting total = 100%)
<p>Explain in a result oriented active sentences major functions that the employee has to fulfill.</p> <ul style="list-style-type: none"> ▪ <i>Organize the job by grouping related tasks that make-up a critical function. List in a logical sequence, i.e. importance, frequency, or work cycle.</i> ▪ <i>Your groupings should describe about 8 critical functions performed. Each critical function describes WHAT is done, the detailed tasks elaborate and explain HOW it is done. Remember a critical function should clearly serve a customer oriented purpose.</i> ▪ <i>When outlining a critical function, clearly indicate whether the incumbent carries it out, or if it is supervised, monitored or directed by the incumbent.</i> ▪ <i>Insure your description of critical functions highlights the extent of planning & organizing, analysis, control, resourcefulness & decision-making.</i> ▪ <i>Focus attention on the importance of the work carried out. Insure brevity, preciseness & conciseness.</i> ▪ <i>Begin statements with action verbs, e.g. designs, consolidates, analyzes, etc...</i> ▪ <i>Use quantitative terms where possible to indicate the frequency of performing the tasks, e.g. daily, weekly, monthly...</i> ▪ <i>Avoid vague generalizations & vague terms such as assists or handles.</i> ▪ <i>Give an accurate & complete picture of the WHOLE job. Use the HELICOPTER EFFECT: "See the forest without losing sight of the trees".</i> 	<p>After listing the critical functions, establish performance standards / outcome for each one. These should be clear statements of conditions defining anticipated results. They are units of measurements that enable the supervisor to accurately and objectively measure the employee's performance level for each task.</p> <p style="text-align: center;"><u>Units of measurements</u></p> <p>Quality – How well the job is done Quantity – How much is done Timeliness – How fast/when it is done Manner – The way it is done Method – The policy or procedure followed Cost – The dollar, manpower, or staff time required</p>	<p>Attribute weighting to each function to define its relative importance. This does not mean that lower rated objectives are unimportant, simply that higher priority should be given to those rated higher.</p> <p>This weighting is predetermined by the departments at the time of preparing the Job Description prior to the review period.</p>
	SCORE	WEIGHTED SCORE
	During the appraisal, this score rates the employees' accomplishment in performing each function on a scale from 1 to 5 as per the scale above.	Calculated Field