



# **Annual Performance Evaluation Form**



# Performance Evaluation Form

Revised as of October 2009

## Instructions & Guidelines

**Instructions:** The purpose of this performance evaluation form is to establish goals and expectations for the current review period, to review your performance, and to identify strengths and areas for improvement since your last review period. Please complete the following steps:

At the beginning of the review cycle....	
<b>Step 1</b>	<b>Complete and Validate Employee Information:</b> Employee & Manager completes page 1. Ratings are not done at this time and will be done at the end of the review cycle. <ul style="list-style-type: none"> <li>o <b>Employee Information:</b> Insert all appropriate employee information, dates and type of review.</li> <li>o <b>Job Description Review:</b> Manager should review current job description to ensure it is accurate. If it needs to be updated, click on the <a href="#">Position Description Template</a> and follow the instructions to review and update the position through Human Resources.</li> </ul>
<b>Step 2</b>	<b>Set Goals and Key Objectives For This Review Period:</b> At the beginning of the review cycle, the employee and manager should document 3-5 key performance goals and objectives that the employee will focus on during the review period. Individual goals should be: <ul style="list-style-type: none"> <li>o Based on the employee's job description; and</li> <li>o Linked and in alignment to current Team/Department/School/District goals.</li> </ul> Save the document with your goals and periodically review and update with your manager throughout the year.

At the end of the review cycle....	
<b>Step 3</b>	<b>Employee Completes Self-Evaluation:</b> Employee completes self-evaluation in Sections I-IV and sends completed form to his or her manager.
<b>Step 4</b>	<b>Manager Completes Employee Evaluation:</b> Manager completes manager review of employee's performance in Sections I-IV and schedules at 1:1 meeting with the employee to review performance evaluation.
<b>Step 5</b>	<b>Sign Completed Evaluation:</b> Employee and manager signs completed evaluation and forwards originals to Mailstop 33-157, Attn: Human Resources. Copies may be retained by the employee and the manager for future reference.
<b>Step 6</b>	<b>Mid-Year Check-In:</b> At their discretion, managers may request employees to complete the Mid-Year Check-In (Section VI) to follow-up on progress towards goals and/or revisit areas for improvement from the last review. <b>NOTE:</b> Managers with employees who received an overall rating of "2 – Below Expectations" are <b>required</b> to have their employee complete Section VI <b>within 6 months</b> from their last review and then set-up a check-in meeting to assess progress.

**Rating Instructions:** Throughout this review, state the ratings where applicable in whole numbers (1, 2, 3, 4, or 5) in accordance with the below definitions. Comments **MUST** be used in support of the numerical rating given, including notation of significant examples.

RATING		DEFINITION OF RATING
<b>5</b>	<b>Outstanding</b>	Consistently exceeds expectations. Performance is above and beyond the expectations for the position and the individual's education and/or experience level. Consistently attains a high level of contribution and accomplishments across a broad range of areas.
<b>4</b>	<b>Above Expectations</b>	Consistently meets and frequently exceeds expectations. Performance is above that which would normally be expected considering the individual's education and/or experience level. Accomplishments are often significant and beyond the scope of the job.
<b>3</b>	<b>Meets Expectations</b>	Consistently meets expectations. Performance is as expected and sometimes beyond expectations considering the individual's education and/or experience level. Performance is consistent and the individual can work independently with an appropriate amount of supervision.
<b>2</b>	<b>Below Expectations</b>	Consistently meets only the minimum requirements. Performance is usually satisfactory, but can be improved through development and experience. Individuals require more supervision considering their education and/or experience level.
<b>1</b>	<b>Unsatisfactory</b>	Consistently fails to meet expectations. Performance is below reasonable expectations for the position considering the individual's education and/or experience level. Immediate and substantial improvement is necessary.



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EMPLOYEE INFORMATION			
EMPLOYEE NAME		POSITION	
SUPERVISOR NAME		DEPARTMENT	
DATE OF HIRE	REVIEW PERIOD COVERS (MM-DD-YY) From: _____ To: _____	DATE OF REVIEW	TYPE OF REVIEW <input type="checkbox"/> Annual <input type="checkbox"/> Mid-Year

**Rating Instructions:** State the ratings where applicable in whole numbers (1, 2, 3, 4, or 5) in accordance with the below definitions. Comments on all ratings are encouraged. For **ratings of 1 or 5**, comments with specific examples are required.

RATINGS & DEFINITIONS		
<b>5</b>	<b>Outstanding</b>	Consistently exceeds expectations. Performance is above and beyond the expectations for the position and the individual's education and/or experience level. Consistently attains a high level of contribution and accomplishments across a broad range of areas.
<b>4</b>	<b>Above Expectations</b>	Consistently meets and frequently exceeds expectations. Performance is above that which would normally be expected considering the individual's education and/or experience level. Accomplishments are often significant and beyond the scope of the job.
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<b>2</b>	<b>Below Expectations</b>	Consistently meets only the minimum requirements. Performance is usually satisfactory, but can be improved through development and experience. Individuals require more supervision considering their education and/or experience level.
<b>1</b>	<b>Unsatisfactory</b>	Consistently fails to meet expectations. Performance is below reasonable expectations for the position considering the individual's education and/or experience level. Immediate and substantial improvement is necessary.

## Section I: Goal Setting and Evaluation of Performance Against Goals & Objectives

In support of **Excellence for All**, we have agreed upon the following goals and objectives which should:

- Reflect a summary of your position's key responsibilities; and
- Be linked and in alignment to support the overall goals and strategies of Seattle Public Schools.

Employee Instructions	Manager Instructions
Comment on your achievement of the results of each key performance goals and objectives, providing specific examples of accomplishments and challenges faced during this review period, and then complete the rating under the boxes marked "E".	Review the employee's comments and explanation of results, provide feedback on the results of the key performance goals and objectives, and then complete the rating under the boxes marked "M".

I. KEY GOALS & OBJECTIVES FOR THIS REVIEW PERIOD				
SMART Goals	Performance Measures	Target Date	Achieved (Yes, No, In Progress)	Rating E=Emp M=Mgr
				E M
				E M
				E M
				E M
				E M



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## I. KEY GOALS & OBJECTIVES FOR THIS REVIEW PERIOD (continued)

<b>Employee Comments</b>	
<b>Manager Comments</b>	

## Section II: Evaluate Performance Against Key Performance Competencies/Standards/Requirements

Employee Instructions	Manager Instructions
Rate your performance against each competency and provide specific examples that support the rating.	Rate the employee's performance against each competency and provide specific examples that support the rating.
Please refer to the <a href="#">Competency Library</a> for more information about the competencies and behavioral descriptors to assist in evaluating and determining an appropriate rating for each competency.	

### A. CORE COMPETENCIES (must be completed by all District employees)

Competency	Provide Specific Examples/Comments	
<b>Collaboration</b> Develops cooperation and teamwork while participating in a group, working toward solutions which generally benefit all involved parties.	EMPLOYEE	Self Rating
	MANAGER	Mgr Rating
<b>Getting Results (Action Oriented)</b> Performs work with energy and drive; values planning, but will take quick, decisive action when an opportunity presents itself.	EMPLOYEE	Self Rating
	MANAGER	Mgr Rating
<b>Decision Quality &amp; Problem Solving</b> Uses analysis, wisdom, experience and logical methods to make good decisions and solve difficult problems with effective solutions; appropriately incorporates multiple inputs to establish shared ownership and effective action.	EMPLOYEE	Self Rating
	MANAGER	Mgr Rating
<b>Integrity</b> Is widely trusted; is seen as a direct, truthful individual; presents truthful information in an appropriate and helpful manner; keeps confidences; admits mistakes; doesn't misrepresent him/herself for personal gain.	EMPLOYEE	Self Rating
	MANAGER	Mgr Rating



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<b>Accountability</b> Holds self and others accountable for measurable high-quality, timely and cost-effective results; determines objectives, sets priorities and delegates work; accepts responsibility for mistakes; complies with established control systems and rules.	EMPLOYEE	Self Rating
	MANAGER	Mgr Rating

B. OTHER RELEVANT COMPETENCIES / STANDARDS / REQUIREMENTS		
Competency	Provide Specific Examples/Comments	
[insert competency]	EMPLOYEE	Self Rating
	MANAGER	Mgr Rating
[insert competency]	EMPLOYEE	Self Rating
	MANAGER	Mgr Rating
[insert competency]	EMPLOYEE	Self Rating
	MANAGER	Mgr Rating
[insert competency]	EMPLOYEE	Self Rating
	MANAGER	Mgr Rating
[insert competency]	EMPLOYEE	Self Rating
	MANAGER	Mgr Rating



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## Section III: Overall Rating & Summary

Employee Instructions	Manager Instructions
Provide any final comments with regard to your manager's overall rating and assessment.	Review your ratings for the Goals (Section I) and Competencies (Section II) and whichever rating was predominantly used should be reflected in your overall rating. Include a summary of overall strengths, necessary areas for development or critical improvements that support the overall rating along with any additional performance-related comments not included in prior sections. More information on how to select the Overall Rating is available in the <a href="#">Performance Evaluation Administrative Guide</a> .

III. OVERALL RATINGS & SUMMARY			
Manager Overall Rating & Comments		Manager's Overall Rating	
		<input type="checkbox"/> 5	Outstanding
		<input type="checkbox"/> 4	Above Expectations
		<input type="checkbox"/> 3	Meets Expectations
		<input type="checkbox"/> 2	Below Expectations
		<input type="checkbox"/> 1	Unsatisfactory
Employee Comments			

## Section IV: Individual Development Plan for Next Review Period

Employee Instructions	Manager Instructions
Identify 2-3 individual or professional developmental goals/objectives for the next review period. Define the knowledge/skill you want to develop, rationale for why it is important to your current/future performance, action steps to be taken, additional key resources necessary to successfully achieve each objective (e.g., required resources, tools, training or other kinds of support), and a general timeline for completion.	Please work with the employee to assist with developing appropriate next steps. Provide comments on how you will support the employee in these developmental opportunities.

IV. INDIVIDUAL DEVELOPMENT PLAN FOR THE NEXT REVIEW PERIOD	
Employee Comments	
Manager Comments	



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## Section V: Employee Acknowledgment & Signatures

Employee Instructions	Manager Instructions
Employee should review and sign completed performance evaluation.	Please sign and forward completed evaluation to Mailstop 33-157, Attn: Human Resources.

### V. EMPLOYEE ACKNOWLEDGEMENT & SIGNATURES

<b>Employee Acknowledgment</b>	I have read this appraisal and have discussed the information with my manager. My signature does not imply agreement, only that the appraisal discussion took place and I was advised of my performance.		
<b>Employee Signature</b>		<b>Date</b>	
<b>Manager Signature</b>		<b>Date</b>	
<b>Director's Signature</b>		<b>Date</b>	

Upon completion, please send completed and signed evaluation forms to Mailstop 33-157, Attn: Human Resources.

FOR HR USE ONLY	
<input type="checkbox"/> Form Received	DATE
<input type="checkbox"/> Data Entered	DATE



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## Section VI: Mid-Year Check-in

Employee Instructions	Manager Instructions
Upon request from your manager, complete the following mid-year check-in section by providing an update on progress towards Goals & Objectives as well as any comments on competencies that are applicable to your work. Send the completed mid-year check-in form to your manager.	Complete the mid-year check-in form upon receipt from your employee and set up a meeting to assess and discuss progress on all appropriate areas. Please document status for relevant items below. Detach and send completed form to Mailstop 33-157, Attn: Human Resources.
EMPLOYEE NAME	SUPERVISOR NAME
DATE OF LAST EVALUATION	DATE OF MID-YEAR CHECK-IN

VI. MID-YEAR CHECK-IN	
Area	Provide Specific Examples/Comments
<b>Goals &amp; Objectives</b> Comment on progress toward any previously established goals and objectives.	EMPLOYEE
	MANAGER
<b>Competencies</b> Comment on progress in appropriate areas: 1) where strengths were demonstrated; and 2) where there are opportunities for improvement.	EMPLOYEE
	MANAGER
<b>Other Comments</b> Provide any other relevant examples or comments with regard to progress to date.	EMPLOYEE
	MANAGER

Employee Signature		Date	
Manager Signature		Date	