

2015 Performance Appraisal Template Samples

Human Resources Peer Networking Benchmarks



13 Examples of Performance Appraisals submitted by MAPP members

Including Core Competencies and Helpful Phrases

2015 Performance Appraisal Template Samples

Human Resources Peer Networking Benchmarks

Example 1

Ratings Description

Exceeds Expectations
Above Expectations
Meets Expectations
Needs Improvement
Below Expectations

Score

5
4
3
2
1

Reliability and Dependability

- 1 The extent to which the employee is punctual, observes prescribed work break/meal periods and has an acceptable overall attendance record
- 2 Employees willingness to work overtime when needed.
- 3 Attends to standardized work consistently - daily drumbeats, pride areas, shift / area discussions, and other (8D, Academy, Safety, etc.) meetings
- 4 Consider the amount of supervision required, and job performance regarding timely completion and follow up
- 5 Accepts full responsibility for his or her decisions as it relates to doing their work efficiently and with a high standard of quality.
- 6 Accepts changes in job assignments and/or duties willingly and in a positive manner

Cultural Initiative and Engagement

- 7 Participating in Learning opportunities (, reading books, 8D Teams, 5S Teams, company committees)
- 8 Actively Participate on 3S Pride Area

Cultural Initiative and Engagement

- 9 Conducts ongoing critique of current practices and continually seeks and implements new approaches to eliminate waste
- 10 Positive Influence on peers, co-workers, customers and suppliers
- 11 Brings two second improvements to and explains at drumbeat meetings.
- 12 Participates at drumbeat meeting in other ways than 2 second improvements
- 13 Employee displays a "can do" attitude

Communication and Relationship Building

- 14 Treats employees at all levels in a respectful manner
- 15 Employee is willing and demonstrates the ability to cooperate, work and communicate with co-workers, supervisors, subordinates and outside contacts
- 16 Recognizes and gives full credit for other team members and associates contribution
- 17 Ability to accept constructive criticism and demonstrate improvements in a positive manner.

Productivity and Quality

- 18 Work is completed thoroughly and correctly following established processes and procedures (ex. Control plan)

Productivity and Quality

- 19 Required paperwork is completed timely, thoroughly and neatly.
- 20 The extent to which an employee consistently produces a significant volume of work efficiently in a specific period of time
- 21 Employee possesses and demonstrates an understanding of the work instructions, processes, equipment and materials required to perform the job.
- 22 Employee possesses the practical and technical knowledge required of the job.
- 23 Ability to work independently with little or no direction or follow up to complete tasks and job assignments

Company Policies and Safety

- 24 Wears proper PPE and other safety equipment for the task at hand
- 25 Works in a safe manner for both themselves and their co-workers
- 26 Follows company policies and procedures such as safety, security, harassment- free environment, non-smoking, etc.

Advancement Opportunities/Desires

Training Needed/Suggested

Areas For Improvement

Expectations For Next Year

General Comments

2015 Performance Appraisal Template Samples

Human Resources Peer Networking Benchmarks

Example 2

Performance Appraisal

Name: _____ Date: _____

Job Title: _____

Department: _____

Review Period: From _____ To _____

Date of Hire: _____

Type of Evaluation: ☐ Six Months ☐ Annual

Definition of Performance Ratings:

Exceptional: Employee consistently exceeds performance objectives with virtually no detected preventable/controllable errors. Makes significant contributions well beyond normal job responsibilities. Individual requires little direction or supervision.

Exceeds Objectives: Employee exceeds performance objectives on a regular basis. Employee is making a valuable contribution to the company. Errors are infrequent and are typically detected and corrected by the employee.

Expected Performance: Employee consistently meets but does not exceed performance objectives. Employee is fully competent and is satisfactorily performing the job.

Marginal/Needs Improvement: Employee does not adequately accomplish objectives nor fulfill all responsibilities; must improve performance within a designated time period. Or, the employee is new to the position and tasks presently assigned are adequately performed as expected.

Unsatisfactory: Unacceptable performance; below expectations. Employee does not accomplish most or all position objectives.

Not Applicable/NA: Category does not apply.

I. Performance of Objectives: Summarize the most important objectives undertaken during the review period and comment on the results achieved. Attach additional sheets as needed.

Objectives

Performance Results

II. Methods Used to Achieve Results: Consider those behaviors that are critical to job success.

A. Job Knowledge: Technical knowledge and skills, analytical ability, problem-solving skills.

B. Communications: Verbal and written communications, presentation skills, and listening skills. Are communications clear, concise, courteous?

Comments: _____

C. Quality of Work: Accuracy, neatness, thoroughness, completeness of work.

Comments: _____

D. Quantity of Work: Work output, speed, timeliness, effectiveness. Work habits.

Comments: _____

E. Dependability: How reliable is the employee in completing assignments and meeting deadlines? Attendance? Punctuality?

Comments: _____

F. Interpersonal Skills: Does employee work harmoniously and effectively with subordinates, peers, supervisors, and the customers? Team player? Shares information with others as needed? Resolves conflicts? Welcomes and seeks constructive feedback on own performance? Cooperative?

Comments: _____

G. Initiative: Does employee work independently? Solves problems? Assumes additional responsibility? Offers suggestions, Looks for more efficient and cost-effective ways?

Comments: _____

H. Adaptability: Is employee able to adjust to a variety of situations? Flexible?

Comments: _____

I. Decision Making: Uses logical and sound judgment.

Comments: _____

J. Other Factors Relevant to the Position:

III. Performance Improvements:

Briefly identify areas showing improvement or areas that required attention from last review.



IV. Employees Strengths:



V. Overall Performance Rating: Consider all performance criteria and indicate overall rating, using definitions of performance levels as a guide.

- ☐ **Exceptional**
- ☐ **Exceeds Objectives**
- ☐ **Expected Performance**
- ☐ **Marginal/Needs Improvement**
- ☐ **Unsatisfactory**



VI. Recommendations: What are the major goals/objectives and accountabilities for the next review period? What are the priorities for the next 6 months?

VII. Developmental Plans: What is the plan to build on performance and to support continued professional development? What actions can be taken to improve performance? Are there on-the-job activities or outside programs or training that would help the employee?

VIII. Employee Acknowledgment:

☐ I have read my job description, understand the principal accountabilities of my position, and understand that this appraisal is based upon my performance in my position.

☐ I have read the appraisal and have discussed its contents with my supervisor. I wish to make the following comments:

Employee Signature: _____ Date_____

Supervisors Signature: _____ Date_____

Manager/Supervisor:

This section should be completed on those employees who have supervisory responsibilities. Use the comment section to explain strengths and weaknesses in each area. List specific action needed to correct any deficiencies.

1. Planning and Organization: Forecasting, setting objectives, anticipating changes; securing and budgeting resources, structuring tasks, establishing priorities.

Comments:

2. Leadership: Ability to take charge. Select, direct, and coordinate activities of others to do better work, assume more responsibility, or prepare for future job opportunities. Coach, motivate, and develop others. Serve as a role model. Make decisions, communicate.

Comments:

3. Control: Select control points, measure and report results, evaluate and correct performance, direct policy and procedure, operate within budget.

Comments:

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Example 3

Performance Review – Self Evaluation

Employee Name _____ Date _____

Job Title _____ Office _____

Supervisor's Name _____

Employee Instructions:

Please complete and return this 3 page self evaluation to your supervisor by ____.

Your thorough and timely participation in the appraisal process will help facilitate a fair and comprehensive review of your progress and accomplishments since the last performance review *.

* If you have been employed by the company less than a year, substitute references to "since the last performance appraisal" with "since you were hired" and answer the questions accordingly.

Supervisors/Managers: Attach completed Self-Assessments to the Employee's Performance Appraisal and return to HR.

1. List your most significant accomplishments or contributions since last year. How do these achievements align with our Company goals/objectives?
2. Since the last appraisal period, have you successfully performed any new tasks or additional duties outside the scope of your regular responsibilities? If so, please specify.
3. What activities have you initiated, or actively participated in, in effort to encourage camaraderie and teamwork within your department and/or team? What was the result?
4. To which of the following factors would you attribute your professional development since last year: offsite seminars/classes (specify if self-directed or required by your supervisor), onsite training, peer training, management coaching or mentoring, on-the-job experience, better exposure to challenging projects, other - please describe.

Performance Review – Self Evaluation

5. Describe areas you feel require improvement in terms of your professional capabilities. List the steps you plan to take and/or the resources you need to accomplish this.
6. Studies have shown that high customer satisfaction and employee satisfaction is closely linked. What are your ideas for improving the Company's client and/or employee satisfaction and retention?
7. State two career goals for the coming year and indicate how you plan to accomplish them.

Evaluate yourself on all factors that apply to you since your last performance appraisal, or date of hire, if employed here less than one year. If a category does not apply to you, indicate N/A.

Rating Scale: 4 - Outstanding 3 - Very Competent or High Level
 2 - Satisfactory 1 - Inexperienced or Improvement Needed

Category	Self-Rating
a. Technical Skills (job/discipline area specific)	_____
b. Technical Knowledge (up-to-date on industry/discipline news, articles and best practices)	_____
c. Quality of Work Product (comprehensive, accurate, timely, etc.)	_____
d. Utilization or Productivity	_____
e. Business Development	_____

Performance Review – Self Evaluation

- f. Project Management Skills _____
- g. Computer Skills
(i.e. MS Word & Excel, etc., the web) _____
- h. Time Management & Organizational Skills _____
- i. Interpersonal Skills
(positive attitude; ability to get along well with co-workers/clients/vendors) _____
- j. Communication Skills - Verbal/Written
(proposals/reports, letters, memos, presentations etc.) _____
- k. Innovation or Creativity _____
- l. Collaboration/Teamwork/Mentoring Skills _____
- m. Employee Policies
(knowledgeable of/compliant with Company policies & procedures) _____
- n. Leadership Skills
(applies to anyone - not restricted to supervisory level employees) _____
- o. Professionalism
(punctuality, attendance; conduct; responsiveness and follow through) _____
- p. **Overall** _____

Thank you for taking the time to complete the Employee Self-Assessment.

Please return this form to your supervisor by: _____.

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Example 4

Production Performance Appraisal

Name: _____ Date: _____

Job Title: _____

Department: _____

Review Period: From _____ To _____

Date of Hire: _____

Type of Evaluation: ☐ Six Months ☐ Annual ☐ End of Introduction Period

Definition of Performance Ratings:

O - Outstanding: Employee consistently exceeds performance objectives with virtually no detected preventable/controllable errors. Makes significant contributions well beyond normal job responsibilities. Individual requires little direction or supervision. Performance is exceptional in all areas and is recognizable as being far superior to others.

V- Very Good: Employee exceeds performance objectives on a regular basis. Employee is making a valuable contribution to the company. Errors are infrequent and are typically detected and corrected by the employee. Performance is of high quality and is achieved on a consistent basis.

G- Good: Employee consistently meets but does not exceed performance objectives. Employee is fully competent and is satisfactorily performing the job.

I - Improvement Needed: Employee does not adequately accomplish objectives nor fulfill all responsibilities; must improve performance within a designated time period. Or, the employee is new to the position and tasks presently assigned are adequately performed as expected. Improvement is necessary.

U- Unsatisfactory: Unacceptable performance; below expectations. Results are generally unacceptable and require immediate improvement.

Not Applicable/NA: Category does not apply.

Core Values

Rating 0-1

0-Not meeting core value

1 -Meeting core value

Integrity

--	--

Leadership

--	--

Improvement

--	--

Core Values

Rating 0-1	0-Not meeting core value	1 -Meeting core value
Reality		
Passion		
Relationships		

**Do not include core values rating in overall rating calculation.*

II. Methods Used to Achieve Results: Consider those behaviors that are critical to job success.

A. Job Knowledge: Technical knowledge and skills, analytical ability, problem-solving skills.

Rating		Scale	Points	Comments:
O		100-90		
V		89-80		
G		79-70		
I		69-60		
U		Below 60		

B. Quality of Work: The extent to which an employee's work is accurate, neat, thorough and complete.

Rating		Scale	Points	Comments:
O		100-90		
V		89-80		
G		79-70		
I		69-60		
U		Below 60		

C. Reliability: The extent to which an employee can be relied upon regarding task completion and follow-up.

Rating		Scale	Points	Comments:
O		100-90		
V		89-80		
G		79-70		
I		69-60		
U		Below 60		

D. Interpersonal Relationships: The extent to which an employee is willing and demonstrates the ability to cooperate, work and communicate with coworkers, supervisors, subordinates and/or outside contacts (including customers).

Rating		Scale	Points	Comments:
O		100-90		
V		89-80		
G		79-70		
I		69-60		
U		Below 60		

E. Initiative: The extent in which an employee seeks out new assignments and assumes additional duties when necessary.

Rating		Scale	Points	Comments:
O		100-90		
V		89-80		
G		79-70		
I		69-60		
U		Below 60		

F. Creativity: The extent to which an employee proposes ideas, finds new and better ways of doing things. Participates on a CI Team and submits IDEAS.

Rating		Scale	Points	Comments:
O		100-90		
V		89-80		
G		79-70		
I		69-60		
U		Below 60		

G. Attendance: The extent, to which an employee is punctual, observes prescribed work break/meal periods and has an acceptable overall attendance record. **How many points does the employee have (list in comment section)?**

Rating		Scale	Points	Comments:
O		100-90		
V		89-80		
G		79-70		
I		69-60		
U		Below 60		

H. Safety: The extent to which an employee works safely. Do they wear their required PPE? Have they had any safety violations/accidents? Do they have a safe mindset?

Rating		Scale	Points	Comments:
O		100-90		
V		89-80		
G		79-70		
I		69-60		
U		Below 60		

I. Adherence to Policy: The extent to which an employee follows conduct rules, other regulations and adheres to company polices. Has the employee violated any policies?

Rating		Scale	Points	Comments:
O		100-90		
V		89-80		
G		79-70		
I		69-60		
U		Below 60		

J. Productivity: The extent to which an employee produced a significant volume of work efficiently in a specified period of time? Does the employee have any performance related issues (i.e.; Scrap, Rework)?

Rating		Scale	Points	Comments:
O		100-90		
V		89-80		
G		79-70		
I		69-60		
U		Below 60		

III. Performance Improvements:

Briefly identify areas showing improvement or areas that required attention from last review.

IV. Employees Strengths:

V. Overall Performance Rating: Consider all performance criteria and indicate overall rating, using definitions of performance levels as a guide.

Total Points / Number of Factors Rated = Overall Rating

O Outstanding (100 – 90)

O Very Good (89-80)

O Good (79-70)

O Improvement Needed (69-60)

O Unsatisfactory (Below 60)

VI. Recommendations: What are the major goals/objectives and accountabilities for the next review period?

VII. Developmental Plans: What is the plan to build on performance and to support continued professional development? What actions can be taken to improve performance? Are there on-the-job activities or outside programs or training that would help the employee?

VIII. Employee Acknowledgment:

☐ I have read my job description, understand the principal accountabilities of my position, and understand that this appraisal is based upon my performance in my position.

☐ I have read the appraisal and have discussed its contents with my supervisor. I wish to make the following comments:

Follow-up requested/desired: YES / NO Follow-Up Date: _____

Employee Signature: _____ Date _____

Supervisor Signature: _____ Date _____

Managers Signature: (if applicable) _____ Date _____

Human Resources Signature: _____ Date _____

2015 Performance Appraisal Template Samples

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Example 5

PERFORMANCE EVALUATION FORM

Date:	Associate Name:	Title:	Department:
	Manager/Supervisor Name:	Title:	Evaluation Period: Annual – 2015 (Review of 2014 Performance)

Directions: Before the evaluation meeting, the Associate and the Manager/Supervisor separately fill out the first two sections of the form. The Associate also fills out the third section. At the evaluation meeting, the last two sections are filled out together. Data is then combined and put into one document that is printed out, signed by both parties, and filed in the Associate's personnel file. A copy is given to the Associate.

1. Evaluation of Last Year's Goals: Refer to the Associates last performance review for goals that were set. Explain changes to the goals, write about factors that caused the goal to be met or not met.

[illegible]

2. Performance and Competencies: Both Associate & Manager/Supervisor write comments regarding the competencies listed in the left column.

*Manager/Supervisor Note: Refer to “Core Competencies List” and add or change “Performance Competencies” below that best align with the roles, responsibilities & expectations of the job.

Performance Competencies	Associate Comments:	Manager/Supervisor Comments:
<i>Safety and Security Awareness</i> Is aware of conditions that affect safety as well as the organization's security, and takes appropriate action as necessary.		

Performance Competencies	Associate Comments:	Manager/Supervisor Comments:

3. Associate Reflections.

Associate completes the following:

- I could do my work more efficiently if:
- My Manager/Supervisor's strengths and areas of improvement as a manager to me are:
- The following professional development opportunities would help me grow in my job:

4. Goals for the next 12 Months: At the evaluation meeting, the Associate & Manager/Supervisor, together, set new goals. Set goals on the SMART criteria (Specific, Measurable, Agreed, Realistic, and Time bound).

GOAL	ACTION (OR TASK)	TIME FRAME
1.		
2.		
3.		
4.		
5.		

5. Review of the job description. At the evaluation meeting, the Associate & Manager/Supervisor must review the job description, making changes if necessary. A signed copy of the job description must be submitted along with the final, signed performance review to Human Resources for the Associate’s personnel file.

Additional Comments:

Associate Signature: _____

Date: _____

Manager/Supervisor Signature: _____

Date: _____

2015 Performance Appraisal Template Samples

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Example 6

SAMPLE TEMPLATE

(Non-Manager, Supervisor – Direct & Indirect Associates)

Performance Appraisal

Employee Name: _____ Title: _____

Department: _____

Type of Review: _____ End of Conditional Period _____ Job Class _____
_____ Annual _____ Other

If other, please note: _____

Instructions: Carefully evaluate employee's work performance in relation to the essential function of the job. Check rating box that indicates Associate's performance. Indicate N/A if not applicable. Assign points for each Rating within the Scale and write the number in the corresponding Points box. Points will be totaled and averaged for an overall performance score.

Definitions of Performance Ratings

O = Outstanding-Performance is exceptional in all areas and is recognizable as being superior to others

V = Very Good-Results clearly exceed most position requirements. Performance is of high quality is achieved on a consistent basis

G = Good-Competent and dependable level of performance. Meets performance standards of the job

I = Improvement Needed-Performance is deficient in certain areas. Meets performance standards of the job

U = Unsatisfactory -Results are generally unacceptable and require immediate improvement

N/A = Not applicable

Factors

1. **Quality of Work** – The extent to which an Associate's work is accurate, thorough and neat.
__ Outstanding (5) __ Very Good (4) __ Good (3) __ Improvement Needed (2) __ Unsatisfactory (1)

2. **Productivity** – The extent to which an Associate produces a significant volume of work efficiently in a specified period of time.
__ Outstanding (5) __ Very Good (4) __ Good (3) __ Improvement Needed (2) __ Unsatisfactory (1)

3. **Job Knowledge** – The extent to which an Associate possess the practical/technical knowledge required for the job.
__ Outstanding (5) __ Very Good (4) __ Good (3) __ Improvement Needed (2) __ Unsatisfactory (1)

4. **Reliability** – The extent to which an Associate can be relied upon regarding task completion and follow-up.
__ Outstanding (5) __ Very Good (4) __ Good (3) __ Improvement Needed (2) __ Unsatisfactory (1)

5. **Attendance** – The extent to which an Associate is punctual, observes prescribed work/break/meal periods and has an acceptable overall attendance record.
 __ Outstanding (5) __ Very Good (4) __ Good (3) __ Improvement Needed (2) __ Unsatisfactory (1)

6. **Independence** – The extent to which an Associate performs work with little or no supervision.
 __ Outstanding (5) __ Very Good (4) __ Good (3) __ Improvement Needed (2) __ Unsatisfactory (1)

7. **Creativity** – The extent to which an Associate proposes ideas, finds new and better ways of doing things.
 __ Outstanding (5) __ Very Good (4) __ Good (3) __ Improvement Needed (2) __ Unsatisfactory (1)

8. **Initiative** – The extent to which an Associate seeks out new assignments and assumes additional duties when necessary.
 __ Outstanding (5) __ Very Good (4) __ Good (3) __ Improvement Needed (2) __ Unsatisfactory (1)

9. **Adherence to Policies** – The extent to which an Associate follows safety and conduct rules, other regulations and adheres to company policies.
 __ Outstanding (5) __ Very Good (4) __ Good (3) __ Improvement Needed (2) __ Unsatisfactory (1)

10. **Interpersonal Relationships** – The extent to which an Associate is willing and demonstrates the ability to cooperate, work and communicate with coworker, leadership, subordinates and/or outside contacts.
 __ Outstanding (5) __ Very Good (4) __ Good (3) __ Improvement Needed (2) __ Unsatisfactory (1)

11. **Judgment** – The extent to which an Associate demonstrates proper judgment and decision making skills when necessary.
 __ Outstanding (5) __ Very Good (4) __ Good (3) __ Improvement Needed (2) __ Unsatisfactory (1)

Overall Rating:

Factor Points _____ divided by Number of Factors Rated _____ = _____ Overall Rating

List 2 accomplishments or new abilities demonstrated since last appraisal:

1. _____

2. _____

List 2 areas of improvement or development:

1. _____

2. _____

Suggestions for professional development:

Overall Summary:

Employee's Comments:

Discussed with Associate on: __/__/__ Associate's Signature: _____

Follow-up date (if any): __/__/__ Next Scheduled Appraisal: __/__/__

Human Resources: _____ Date: __/__/__

Evaluator's Signature: _____ Date: __/__/__

Current Wage/Salary: \$_____ (Bi-weekly) + Increase Amount: _____% = New Wage/Salary:
\$_____ (Bi-weekly)

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Example 7

Employee Evaluation Form

Rating Criteria:

5. Greatly exceeds established standards
4. Exceeds established standards
3. Meets established standards
2. Did not meet established standards
1. Significantly below established standards

Employee Name: _____ Hire Date: _____

Position: _____ Prepared by: _____

Appraisal Purpose: To evaluate job performance for the period of: _____ and _____.

Evaluate Job Performance

Rating
(circle one)

- | | |
|---|-----------|
| 1. <u>Job Knowledge:</u> Employee has good understanding of job functions and shows skills obtained through experience, education and training. Understands basic company operations that impacts his/her specific function. | 1 2 3 4 5 |
| 2. <u>Quality of Work:</u> Employee has met established projects and/or tasks previously assigned accurately, completely and timely. Employee pays attention to detail and understands/follows existing procedures for their position. Does the employee know our Quality Policy? | 1 2 3 4 5 |
| 3. <u>Analytical/Problem Solving Skills:</u> Employee has ability to thoroughly analyze problems and determine course of action. Employee evaluates solutions taking into consideration risks and logic. Includes co-workers in the decision making process. | 1 2 3 4 5 |
| 4. <u>Initiative:</u> Employee seeks out new assignments. Uses personal drive and ingenuity in pursuing new and better ways of doing the job. Employee continues career development and stays abreast of new developments in his/her area of expertise. | 1 2 3 4 5 |
| 5. <u>Productivity:</u> Employee achieves objectives and adjusts to changing circumstances. Shows sense of urgency and prioritizes activities well. Employee is responsive to customer needs and works well under pressure. | 1 2 3 4 5 |
| 6. <u>Planning and Organization:</u> Employee plans work in advance and time is structured to accomplish desired results. Employee works well with minimal supervision, but seeks out direction when needed. | 1 2 3 4 5 |

Evaluate Behavioral Skills

- | | |
|---|-----------|
| 1. <u>Attendance:</u> Employee comes to work when scheduled. Employee shows flexibility to work overtime. | 1 2 3 4 5 |
| 2. <u>Punctuality:</u> Employee observes prescribed hours and is punctual. | 1 2 3 4 5 |
| 3. <u>Working Relationships:</u> Employee is able to interact positively with others and fosters a team attitude. Please evaluate the following individually: | |

Co-workers: 1 2 3 4 5 Managers: 1 2 3 4 5 Subordinates: 1 2 3 4 5 N/A Outside Contacts: 1 2 3 4 5

Rating
(Circle one)

4. Dependability: Employee is reliable and prompt to answer requests. Shows ability to follow through with assignments in a timely manner and requires minimal supervision. 1 2 3 4 5

5. Communication: Please evaluate the accuracy, clarity and effectiveness of the following:

Verbal Skills: 1 2 3 4 5 Written Skills: 1 2 3 4 5

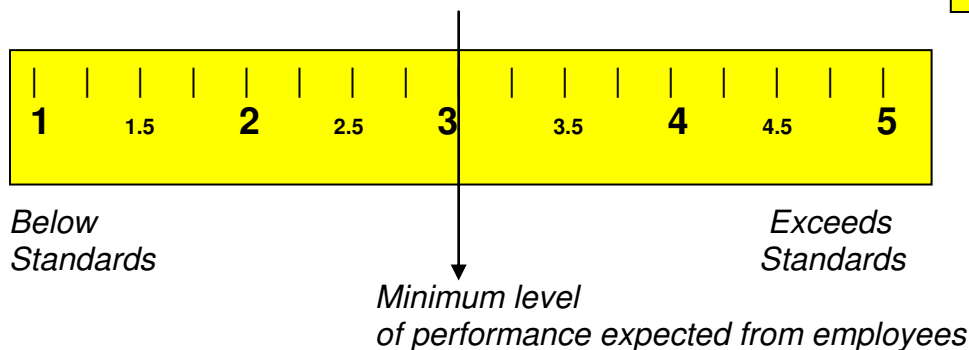
6. Work Habits: Employee follow company policies. S/he is aware of the importance of working in a safe manner and is responsive to safety issues. Employee engages in work activities that do not cause negative exposure for the company. 1 2 3 4 5

7. Has there been any disciplinary actions in this period? [] Yes [] No

If yes, in what area? _____

Have improvements been made? [] Yes [] No

Please add all the numbers you circled and divide by the total applicable categories.
Write the total in the box. This is the employee's overall score.
Mark in the ruler where the employee's score falls.



Goals and Training

Looking back at the last review period, what goals were set and have they been met?
Please list areas of accomplishments for this period.

Looking ahead, what areas need to improve? Please list goals to be attained by next review.

In what area(s) does this employee need to receive additional training?

In what area(s) does this employee express a desire to receive additional training?

Employee Comments:

I understand that my signature below indicates only that I have read and discussed this performance evaluation with my supervisor/manager; this does not necessarily constitute my agreement with this evaluation's content.

Employee's signature: _____

Date: _____

Supervisor's/
Manager's signature: _____

Date: _____

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Example 8

PERFORMANCE APPRAISAL

Name _____
 Job Title: _____
 Date of Hire: _____
 Appraisal By: _____
 Appraisal Date _____

Appraisal Type:

☐ Mid-Year
☐ Year-End
☐ Other

Appraiser:

☐ Self
☐ Peer
☐ Supervisor / Manager

RATING CRITERIA

- 4 Consistently Exceeds Job Requirements** (excellent individual performance; frequently goes above & beyond to exceed expectations)
3 Consistently Meets Job Requirements (fulfills individual responsibilities in an acceptable manner; meets expectations)
2 Meets Most Job Requirements (in a generally acceptable manner but further improvement is expected in role/current position)
1 Does Not Meet Job Requirements (at minimum acceptable standards and immediate improvement is required)
N/A Not Applicable (unable to rate individual due to insufficient knowledge or exposure to the employee)

INDIVIDUAL WORK ETHIC

Considerations: * Displays desire to satisfy the Customer (both internal and external) and to “ <u>Exceed Expectations</u> ” in his/her role. * Dependable. * Positive attitude. * Productive (individual). * Consistently deliver tangible results. * Timely follow-through on projects & assigned work * Demonstrates hustle & purpose in daily tasks/responsibilities. * Puts forth extra effort & “goes the extra mile” (without being instructed to do so or pushed).	Appraiser’s Rating	Comments to Support Rating
		Self:
		Opportunity for Improvement (Self):
	Supervisor / Manager:	Strengths (Supervisor / Manager):
		Opportunity for Improvement (Supervisor / Manager):

TECHNICAL ABILITY, COMPETENCY & EFFICIENCY

Considerations: * Daily tasks are performed accurately, with consistently high degree of attention-to-detail (i.e. high quality), and within agreed upon timeframes. * The daily quantity of work performed is appropriate to the job function & level of responsibility. * Demonstrates individual initiative and works to continually enhance his/her skills & abilities.	Appraiser’s Rating	Comments to Support Rating
		Self:
		Opportunity for Improvement (Self):
	Supervisor / Manager:	Strengths (Supervisor / Manager):
		Opportunity for Improvement (Supervisor / Manager):

INTERPERSONAL SKILLS & COMMUNICATION		
Considerations: * Treats people with dignity & professionalism, and ensures that others are treated the same way. * Shows respect for the opinions of others. * Remains objective when faced with differing views. * Is approachable by people at all levels. * Solicits feedback to ensure his/her message was received accurately.	Appraiser's Rating	Comments to Support Rating
	Self:	Strengths (Self):
		Opportunity for Improvement (Self):
	Supervisor / Manager:	Strengths (Supervisor / Manager):
		Opportunity for Improvement (Supervisor / Manager):

TEAM EFFECTIVENESS		
Considerations: * Works effectively with co-workers (at all levels, across all shifts, and among all departments) to collectively achieve team & Company objectives. * Consistently demonstrates Core Values of: Customer Service, Teamwork, Respect & Professionalism.	Appraiser's Rating	Comments to Support Rating
	Self:	Strengths (Self):
		Opportunity for Improvement (Self):
	Supervisor / Manager:	Strengths (Supervisor / Manager):
		Opportunity for Improvement (Supervisor / Manager):

ADDITIONAL EMPLOYEE COMMENTS (if applicable)

ADDITIONAL SUPERVISOR / MANAGER COMMENTS (if applicable)

OVERALL PERFORMANCE RATING	
<input type="checkbox"/>	Consistently exceeds job requirements; excellent individual performance; frequently goes above & beyond to exceed expectations.
<input type="checkbox"/>	Consistently meets job requirements; fulfills individual responsibilities in an acceptable manner; meets expectations.
<input type="checkbox"/>	Meets most job requirements in a generally acceptable manner but further improvement is expected in role/current position.
<input type="checkbox"/>	Does not meet job requirements at minimum acceptable standards and immediate improvement is required.

INDIVIDUAL GOALS & CONTINUOUS IMPROVEMENT PROJECTS (if applicable)	
GOAL or PROJECT	COMPLETION (Month/Year)

Employee Signature: _____	Date: _____
Supervisor / Manager Signature: _____	Date: _____
Human Resources Signature: _____	Date: _____

2015 Performance Appraisal Template Samples

Human Resources Peer Networking Benchmarks

Example 9

Employee's Name:

Title:

Supervisor:

Review Period:

Performance Review Form

A. CURRENT RESPONSIBILITIES

Attach a current position description. If applicable, make note of any significant changes since last year's performance review. Go over with employee.

B. PERFORMANCE ASSESSMENT

1. **Evaluate and discuss the employee's job performance.** Base your evaluation upon the position requirements, achievement of the goals established during the past year, and your assessment of the employee's accomplishments.
2. **Are there areas of exceptional performance that should be particularly noted?** Provide specific examples.
3. **Are there areas of performance needing more attention or improvement?** Provide specific examples.

"SMART" GOALS WORKSHEET

Specific – Measurable – Actionable – Realistic – Time Bound

"SMART" Goals used during the yearly performance appraisal process help to outline the goals set in the above sections. These goals are intended to be re-visited by the employee and the supervisor regularly throughout the year so that progress toward achieving the goals can be monitored carefully. Please review the above "SMART" acronym and the example below before revisiting the goals set above and converting them to "SMART" goals.

Model: To (action verb) (single key result) by (target date) requiring (resources).

Example: If one of the employee's goals was to become more proficient with Excel, converting that into a "SMART" goal would be:

To integrate the use of Excel in tracking employees and the training programs they attend by January 1, with the help of training programs offered through the ATC.

Specific	Become more proficient in Excel.
Measurable	Utilize Excel in tracking employee training programs.
Actionable	By attending training programs offered through the ATC, the employee will learn how to build an Excel database.
Realistic	The deadline for completing this task will be one year from now, which gives more than enough time to attend training programs, build a database, and integrate the use of the database into the workflow.
Time Bound	Complete by January 1, 2014 for next year's appraisal process.

This goal has a specific end product and a deadline that is accomplishable. It is not vague, and will be easy to revisit over the course of the year for the purposes of tracking progress.

SMART Goal

1: _____

SMART Goal

2: _____

SMART Goal

3: _____

Final agreed upon goals (after the supervisor and employee discussion):

SMART Goal

1: _____

SMART Goal

2: _____

SMART Goal

3: _____

TRAINING CHECKLIST

Training and professional development sessions you'd like employee to attend in the coming year to accomplish their "SMART" goals:

Technology Training ☐ (please specify) _____

Communication Skills ☐

Writing Skills ☐

Time Management/Organization ☐

Project Management ☐

Supervisory Training ☐

Please specify needs: _____

Leadership Development ☐

Please specify needs: _____

Other (please specify) _____

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

Employee's Signature:

Date:

Supervisor's Signature:

Date:

2015 Performance Appraisal Template Samples

Human Resources Peer Networking Benchmarks

Example 10

Employee's Name:

Title:

Supervisor:

Review Date:

Performance Review

OPERATORS

- Assemble, trim and package molded parts as prescribed in the operator instructions and the on the job training provided.
- Accurately complete the required paperwork.
- Follow all safety requirements and procedures per the training received.
- May be assigned to various tasks or projects as the need arises.

Performance Competencies: Attendance, Output, Quality/Job Knowledge, Team Work, Safety

5 - Exceptional:	Performance is consistently superior and significantly exceeds position requirements.					
4 - Highly Effective:	Performance frequently exceeds position requirements.					
3 - Proficient:	Performance consistently meets position requirements.					
2 - Inconsistent:	Performance meets some, but not all position requirements.					
1 - Unsatisfactory:	Performance consistently fails to meet minimum position requirements; employee lacks skills required or fails to utilize necessary skills.					
Safety - Each employee is responsible for performing all tasks according to established safety standards and promoting a safe work environment.						
1. Wears proper personal protective equipment, such as safety glasses, at all times in the plant.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional comments:						
2. Looks for unsafe conditions and helps to resolve them or notifies the proper person of the condition		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional comments:						
3. Knows the Lockout/Tag out procedures and follows them accordingly		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional comments:						
Output - The amount of work accomplished is output. Each employee is responsible to meet production goals and work as efficiently as possible.						
4. Possesses skills and knowledge to perform the job consistently and successfully		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional comments:						
5. Notifies proper people and uses time effectively when machines are down.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional comments:						
6. Keeps accurate count of production and scrap. Properly records this on Score Boards		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional comments:						

5 - Exceptional:	Performance is consistently superior and significantly exceeds position requirements.	5 - Exceptional	4 - Highly Effective	3 - Proficient	2 - Inconsistent	1 - Unsatisfactory
4 - Highly Effective:	Performance frequently exceeds position requirements.					
3 - Proficient:	Performance consistently meets position requirements.					
2 - Inconsistent:	Performance meets some, but not all position requirements.					
1 - Unsatisfactory:	Performance consistently fails to meet minimum position requirements; employee lacks skills required or fails to utilize necessary skills.					
Quality/Job Knowledge- Produce and pack defect free products that meet the customer specifications.						
7. Understands the necessary criteria to identify and produce an acceptable part, including first piece approval (FPA) process		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional comments:						
8. Uses the MOM Book appropriately		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional comments:						
9. Demonstrates effective problem solving ability while also knowing when to use help chain by contacting lead operator		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional comments:						
Team Work- The demonstrated ability to successfully support, communicate with, influence and work with others while focusing on company goals and objectives.						
10. Offers and accepts constructive feedback (is open to others' ideas, uses positive language, not quick to take offense, looks for solution instead of blame)		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional comments:						
11. When necessary, offers assistance and support to co-workers (does not waste time)		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional comments:						
12. Works actively to resolve conflicts and stays away from "rumor mills"		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional comments:						
Attendance- The extent to which the employee can be depended upon to be available for work and to fulfill position responsibilities.						
13. Maintains regular attendance						
Number of tardies(in last year):	Number of unexcused absences:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Begins work on time (is at work location on time)						
Additional comments:		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. Takes brakes appropriately						
Additional comments:		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5 - Exceptional:	Performance is consistently superior and significantly exceeds position requirements.	5 - Exceptional	4 - Highly Effective	3 - Proficient	2 - Inconsistent	1 - Unsatisfactory
4 - Highly Effective:	Performance frequently exceeds position requirements.					
3 - Proficient:	Performance consistently meets position requirements.					
2 - Inconsistent:	Performance meets some, but not all position requirements.					
1 - Unsatisfactory:	Performance consistently fails to meet minimum position requirements; employee lacks skills required or fails to utilize necessary skills.					

Performance Summary (attach additional pages as necessary)

1. List all aspects of employee's performance that contribute to his or her effectiveness. Please give examples.
2. List aspects of employee's performance that require improvement for greater effectiveness.
3. What additional training/ development will he/she need to be successful?

Goal Setting and Development Planning

4. List the employee's performance goals for the coming year (at least 3 measurable goals):

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

Employee's Signature:

Date:

Supervisor's Signature:

Date:

2015 Performance Appraisal Template Samples

Human Resources Peer Networking Benchmarks

Example 11

Self Evaluation Form

Employee's Name:

Title:

Supervisor:

Review Period:

Employee Instructions:

Please complete and return this 3 page self evaluation to _____ in HR by ____.

Your thorough and timely participation in the appraisal process will help facilitate a fair and comprehensive review of your progress and accomplishments.

A. CURRENT RESPONSIBILITIES

What do you consider to be the top three to five priorities of your job as you understand them?

B. PERFORMANCE ASSESSMENT

1. What do you see as your greatest accomplishments or successful efforts over this past review period (or since you started)?
2. What factors, environmental or otherwise, impacted your job or your ability to perform your job during the last review period?
3. Complete the following sentence. *I believe that my greatest contribution to _____ is:*
4. In what area or areas would you like to gain more experience, training or education?
5. What activities, classes or trainings have you participated in over the last review period in order to develop yourself professionally?
6. What could you do to perform you job duties and assigned tasks more efficiently?
7. What can your supervisor or co-workers do to assist you in becoming more efficient?
8. What other comments or suggestions would you like to offer?

“SMART” GOALS WORKSHEET

Specific – Measurable – Actionable – Realistic – Time Bound

“SMART” Goals used during the yearly performance appraisal process help to outline the goals set in the above sections. These goals are intended to be re-visited by the employee and the supervisor regularly throughout the year so that progress toward achieving the goals can be monitored carefully. Please review the above “SMART” acronym and the example below before revisiting the goals set above and converting them to “SMART” goals.

Model: To (action verb) (single key result) by (target date) requiring (resources).

Example: If one of the employee’s goals was to become more proficient with Excel, converting that into a “SMART” goal would be:

To integrate the use of Excel in tracking employees and the training programs they attend by January 1, with the help of training programs offered through the ATC.

Specific	Become more proficient in Excel.
Measurable	Utilize Excel in tracking employee training programs.
Actionable	By attending training programs offered through the ATC, the employee will learn how to build an Excel database.
Realistic	The deadline for completing this task will be one year from now, which gives more than enough time to attend training programs, build a database, and integrate the use of the database into the workflow.
Time Bound	Complete by January 1, 2014 for next year’s appraisal process.

This goal has a specific end product and a deadline that is accomplishable. It is not vague, and will be easy to revisit over the course of the year for the purposes of tracking progress.

SMART Goal

1: _____

SMART Goal

2: _____

SMART Goal

3: _____

Final agreed upon goals (after the supervisor and employee discussion):

SMART Goal

1: _____

SMART Goal

2: _____

SMART Goal

3: _____

TRAINING CHECKLIST

Training and professional development sessions you'd like to attend in the coming year to accomplish your "SMART" goals:

Technology Training ☐ (please specify) _____

Communication Skills ☐

Writing Skills ☐

Time Management/Organization ☐

Project Management ☐

Supervisory Training ☐

Leadership Development ☐

Please specify needs: _____ Please specify needs: _____

Other ☐ (please specify) _____

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

Employee's Signature:

Date:

Supervisor's Signature:

Date:

2015 Performance Appraisal Template Samples

Human Resources Peer Networking Benchmarks

Example 12

Employee's Name:

Title: Operator

Supervisor:

Review Date:

Self Evaluation- Operator

Employee Instructions:

Please complete and return this 3 page self evaluation to in HR by 12/1/2014

Your thorough and timely participation in the appraisal process will help facilitate a fair and comprehensive review of your progress and accomplishments.

Performance Competencies: Attendance, Output, Quality/Job Knowledge, Team Work, Safety

5 - Exceptional:	Performance is consistently superior and significantly exceeds position requirements.					
4 - Highly Effective:	Performance frequently exceeds position requirements.					
3 - Proficient:	Performance consistently meets position requirements.					
2 - Inconsistent:	Performance meets some, but not all position requirements.					
1 - Unsatisfactory:	Performance consistently fails to meet minimum position requirements; employee lacks skills required or fails to utilize necessary skills.					
<u>Safety</u> - Each employee is responsible for performing all tasks according to established safety standards and promoting a safe work environment.						
1. Wears proper personal protective equipment, such as safety glasses, at all times in the plant.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional comments:						
2. Looks for unsafe conditions and helps to resolve them or notifies the proper person of the condition		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional comments:						
3. Knows the Lockout/Tag out procedures and follows them accordingly		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional comments:						
<u>Output</u> - The amount of work accomplished is output. Each employee is responsible to meet production goals and work as efficiently as possible.						
4. Possesses skills and knowledge to perform the job consistently and successfully		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional comments:						
5. Notifies proper people and uses time effectively when machines are down.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional comments:						
6. Keeps accurate count of production and scrap. Properly records this on Score Boards		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional comments:						

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Additional comments:						
8. Uses the MOM Book appropriately		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional comments:						
9. Demonstrates effective problem solving ability while also knowing when to use help chain by contacting lead operator		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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10. Offers and accepts constructive feedback (is open to others' ideas, uses positive language, not quick to take offense, looks for solution instead of blame)		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional comments:						
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Additional comments:						
12. Works actively to resolve conflicts and stays away from "rumor mills"		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional comments:						
Attendance- The extent to which the employee can be depended upon to be available for work and to fulfill position responsibilities.						
13. Maintains regular attendance						
Number of tardies(in last year):	Number of unexcused absences:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Begins work on time (is at work location on time)						
Additional comments:		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. Takes breaks appropriately						
Additional comments:		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Performance Summary (attach additional pages as necessary)

1. Were there areas in which you feel you experienced growth or development over the past year? Please describe.
2. Were there obstacles to your progress last year?
3. What do you expect from your Leader? What kind of support or guidance would you like to see from your supervisor?

Lead Op-

Supervisor-
4. What can your supervisor and your coworkers expect from you?
5. Is there additional support from the organization that would help you do your job more effectively?

Goal Setting and Development Planning

6. Suggest three goals for next year that you would like to discuss with your supervisor.

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

Employee's Signature:

Date:

Supervisor's Signature:

Date:

2015 Performance Appraisal Template Samples

Human Resources Peer Networking Benchmarks

Example 13

Performance reviews / Differentiation Spring 2015



- **AGENDA**

1. Spring 2015
Differentiation
process, timing &
action.
2. Development /
Succession Planning
3. Performance
Improvement Plans

Spring 2015 Timing & Action

Annual Review Timeline	
Thursday, February 19th	Training/review with Supervisors on how to conduct effective performance reviews. Review process and timeline/deadlines during training.
Thursday, February 19th	Supervisors receive copies of previous year reviews, disciplinary actions, memo to files, quality write ups and preparation answer question sheet.
Monday, February 23 rd -Friday, February 27th	Supervisors provide associates with a copy of the preparation answer questions and discuss deadline (3/4) for the sheet to be returned to supervisor.
Wednesday, March 4th	Preparation answer question sheet submitted to Supervisor.
Friday, March 13th	All reviews are completed and submitted to HR for review prior to Supervisor sit down meeting with associate. HR will review the information and provide any suggestions for changes.
Wednesday, March 18th	HR will return reviews with comments to Supervisors.
Thursday, March 19 th – Wednesday, April 1st	All reviews completed with associates and returned to HR with preparation answer questions and original packet provided by HR.

Performance reviews & Differentiation

why we do it

- **For the employee**

- We want associates to know where they stand
 - Current level of performance
 - Development & Succession Plans / Performance Improvement Plans
 - **Future opportunities (potential)**
 - **Our investment in their growth & development**

- **For the business**

- How strong is our bench?
 - **What are our current / future needs**
 - Movement planning (proactive)
 - We prefer to fill internally
 - Current talent “liabilities” / how it impacts our business

Importance of Spring Differentiation

Invest time in the Spring performance review cycle to make the Fall cycle more efficient

- ✓ Associates should clearly know “where they stand” / current performance trend
- ✓ It's easier to have difficult performance conversations when there are no surprises
- ✓ Less emotional – no merit decisions at this time
- ✓ What is the focus for the next 6 months?

Differentiation – moving forward

- DIFFERENTIATION PROCESS IN 4-STEPS (4-Rs)

1. Rate	2. Reconcile	3. Re-balance	4. Review
THIS IS A FIRST PASS AND STARTING POINT	MEASURE AGAINST THE CURVE	DIFFERENTIATE AND ADJUST	TEST THE SYSTEM
<u>Keep it simple!</u>	<u>Apply Metrics</u>	<u>Make Changes</u>	<u>Validate Equality</u>
Assign each associate an intuitive rating based on performance over the past 6 month review period.	Review current distribution of ratings to desired outcome.	Calibrate ratings across supervisors (consistency)	Do ratings differentiate top, middle, and low performance ?
This should be a simple “gut” feel for where there should be rated.	Identify specific areas of focus; where do adjustments need to be made?	Make comparisons of associates and change ratings.	Rating distribution should be + / - 2% to target.
		Force rank Associates if needed.	Review compensation for internal equity based on performance

ABSOLUTE (INDIVIDUAL)

RELATIVE (**DIFFERENTIATED** COMPARISON TO PEERS)

Differentiation- Begins with Performance Reviews

1. We assess Associate performance:

Attendance - Safety - Accuracy of Work / Quality - Productivity / Results
Attitude – Initiative – Creativity - Flexibility

2. Then we Differentiate :

GROUPING	Category	% of Associates
Group A	Strongest Contributors	10%
Group B	B1: Strong Performer	20%
	B2: Meets Expectations	40%
	B3: Needs Improvement	20%
Group C	Requires Significant Improvement	10%

Performance Reviews & Differentiation- Expectations

1. Execution of our process and timeline

- ✓ Reviews required for all associates
- ✓ Self Reviews are REQUIRED
- ✓ 1:1 meetings between Associate / Supervisor
- ✓ Group meetings re: Differentiation – Follow the 4 Step Process (4Rs – Rate, Reconcile, Re-Balance, Review)

2. Differentiate performance of our Associates

GROUPING	Category	% of Associates
Group A	Strongest Contributors	10%
Group B	B1: Strong Performer	20%
	B2: Meets Expectations	40%
	B3: Needs Improvement	20%
Group C	Requires Significant Improvement	10%

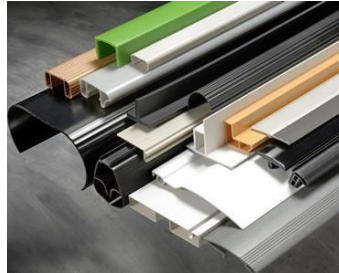
3. Take action

- ✓ **Develop & Recognize top performers (Best People, Biggest Opportunity)**
- ✓ **Development Plans needed for high potentials (select As/B1s/B2s)**
- ✓ **Performance Improvement Plans (PIPs) (select B3s)**
- ✓ **Transition C players (especially if past 2-3 reviews); time to upgrade talent**

Differentiation- Spring 2015

- The toughest part of a management role – takes time to get good at the people processes; **improvement comes with experience**
- We have high expectations for our people- **Meeting Expectations (B2) is a strong rating with valued contribution...**
- The value of Performance Improvement (B3) is exponential
- Its okay to provide tough messages - **When people clearly know where they stand, two things happen:**
 1. You retain those you want to keep
 2. You lose or transition those that weren't a "fit" in their role

Differentiation- Impact on the Business



The Differentiation process supports many actions in the business:

- Internal movement and succession planning
- Identification of internal production talent to provide development for future growth opportunities

Development Planning – Make it Easy

Development plans should be utilized for select associates that are considered high-potential for future roles of increasing responsibility and leadership.

Consider 3 things:

- 1. What is the employee's current role / level of performance?**
 - What needs to be developed to improve their current level of performance / contribution?
- 2. What critical objectives is this employee responsible for?**
 - What are the key enablers of the employee's ability to achieve and / or exceed those critical objectives? Are any of those enablers a development need for the employee?
- 3. What is the career path / future roles for this employee?**
 - What development is needed to increase the employee's readiness for future (lateral or promotion) roles?
 - What specific knowledge, skills, experiences, etc. are key enablers of success at the next level?

Consider knowledge, skills, abilities, and leadership / behavioral needs

WHAT and HOW we develop

WHAT we develop

1. Organizational Knowledge

- ☐ Functional alignment
- ☐ How we operate
- ☐ How we make decisions

2. Skills and abilities

- ☐ Functional
- ☐ Technical

3. Behaviors

- ☐ Interpersonal
- ☐ Leadership
- ☐ Self awareness

HOW we develop

1. Assignments

- ☐ New role
- ☐ Add responsibilities

2. Projects

- ☐ Shorter in duration
- ☐ Focus on exposure/experience
- ☐ Great assessment opportunity

3. Training/Education

- ☐ Best for very job-specific/technical development

4. Feedback/Coaching/Mentoring

Performance Improvement Plans

Performance Improvement Plans should be utilized for select B3s / Cs that clearly have the desire, willingness, and capability to improve performance.

Why should we utilize the PIP process?

To provide support to our associates in improving their performance to levels that meet expectations. A well executed PIP process also aids in the following:

1. No surprises to the associate
2. Clear documentation = clear expectations of improvement and accomplishments
3. Reduce our liability in the event that performance does not improve

When should we utilize a PIP?

1. When an associate is assessed as a B3 – Needs Improvement
 - *Select Cs (Requires Significant Improvement) where previous performance documentation is minimal / non-existent*
2. Coaching and feedback have not produced desired change (results / behaviors)
3. “Disconnect” between associate and their Manager
4. At any point in time where a performance trend is not meeting expectations; not just following up Performance Reviews

Turnover costs \$ - Success of the associate is the goal!

Performance Improvement Plans- Documentation

DO.....

- **Ensure associate understands their value to - the process is about improvement**
- Understand why associate is not performing
- **Align improvement areas to assessment areas, including our values**
- **Provide necessary support / training for success as needed**
- Execute the timelines in the plan as documented
- **Document progress throughout the plan**
- Keep the process confidential

DO NOT.....

- Speculate the cause of not meeting performance expectations
- **Negotiate terms of the PIP**
- Mix poor performance with other issues
- **Accept “word of mouth” regarding performance – have the facts**
- Let time slip away – follow through is critical
- **Reduce job responsibilities to aid in performance**

Turnover costs \$ - Success of the associate is the goal!

Frequently Asked Questions

Should associates still within their first 90 days participate in this process?

No. Associates within their first 90 days should follow the normal 45/90 day review process as part of their probationary period.

Are self reviews required?

Yes, self reviews are required to ensure our Associates' have an opportunity to rate themselves. This provides a foundation for comparing their supervisor's rating during the Performance Review discussion.

Am I required to have a formal conversation with my direct reports?

Yes. As part of the Performance Review and Differentiation process, the final step is to review Associate performance with a 1:1 discussion based on the input the Supervisor wrote in the review form.

Which Associates need to have Development / Succession Plans?

Development plans should be utilized for select associates that are considered high-potential for future roles of increasing responsibility and leadership.

Which Associates need to have Performance Improvement Plans?

Performance Improvement Plans should be utilized for select B3s / Cs that clearly have the desire, willingness, and capability to improve performance.

Core Competencies and Helpful Phrases

Human Resources Peer Networking Benchmarks

CORE COMPETENCIES LIST

A

Accountability

Accountability looks at the extent to which an individual is willing to accept responsibility. This competency asks the question "How do you look at responsibility for your work?"

Accuracy

Accuracy looks at the extent to which an individual's work is correct and error free within company policies and guidelines. This competency asks the question "How well do you perform your work, and check the quality of the work before passing it along?"

Active Listening

Active listening looks at the extent to which an individual actively attends to, conveys, and understands the comments and questions of others. This competency asks the question "How well do you really hear and understand what others are saying?"

Adaptability

Adaptability looks at the extent to which an individual can fit into a changing working environment. This competency asks the question "How readily can you adapt your way of working or thinking in response to changing workplace conditions?"

Ambition

Ambition looks at the extent to which an individual demonstrates drive and initiative in seeking personal advancement or recognition. This competency asks the question "How eager are you to push your work limits and broaden your skills base?"

Analytical Skills

Analytical skills looks at the ability of the individual to gather raw data and to process that data into a meaningful form. This competency asks the question "How well can you work with information and raw data and develop from that information meaningful conclusions?"

Applied Learning

Applied learning looks at whether an individual takes part in needed learning activities in a way that makes the most of the learning experience. This competency asks the question "How well can you apply new knowledge, understanding, or skill to practical use on the job?"

Assertiveness

Assertiveness looks at whether the individual is self-confident and can support and defend decisions. Assertiveness is a communication style that a person can use to facilitate the completion of a work assignment. This competency asks the question "How well do you stand up for your decisions and actions once they have been made or taken?"

Autonomy

Autonomy looks at the ability of the individual to complete assigned tasks with little oversight. This competency asks the question "How self-directed are you in completing your work?"

B

Business Acumen

Business acumen looks at the ability of the individual to understand and discriminate between various business related topics and issues. This includes insight into, and understanding of, specialized business concepts. This competency asks the question "How well do you comprehend the larger issues surrounding a business?"

C

Change Management

Change management looks at the ability of the individual to encourage others to seek opportunities for different and innovative approaches to addressing problems and opportunities. This competency asks the question "How well can you facilitate the implementation and acceptance of change within the workplace?"

Coaching and Development

Coaching and development looks at the ability of an individual to provide guidance and feedback to help others strengthen specific knowledge/skill areas needed to accomplish a task or solve a problem. This competency asks the question "How well can you identify and help others to improve their knowledge or skills?"

Communication, Oral

Oral Communication skills looks at the extent to which an individual communicates with economy and clarity, actively engaging in conversations in order to clearly understand others' message and intent, and receives and processes feedback. This competency asks the question "How well do you send verbal messages and listen to people's responses in order to convey information?"

Communication, Written

Written communication skills looks at the extent to which an individual writes concise, clear letters, reports, articles, or e-mails, including proofing and editing. This competency asks the question "How well do you write, edit, and proof written materials?"

Competitiveness

Competitiveness looks at the willingness of the individual to compare their results against the results of others; a desire to "get ahead." Competitiveness is a trait that is better suited for some positions, but may not be sought for other positions. This competency asks the question "Do you see yourself in competition with your co-workers, or as a member of a team striving for a goal?"

Conceptual Thinking

Conceptual thinking is the ability to understand a situation or problem by identifying patterns or connections between ideas or situations that are not obviously related; to recognize and organize the parts of an issue in a systematic way; and to frame new ideas and courses of action. This competency asks the question "How well do you recognize the common factors in new situations and apply previously successful approaches to those situations?"

Conflict Resolution

Conflict resolution looks at how effectively the individual deals with others in an antagonistic situation. This competency asks the question "How well can you reduce tension or conflict between two or more people using appropriate interpersonal styles and methods?"

Consensus Building

Consensus building looks at the willingness or ability of the individual to interact with others resulting in group solidarity or an agreement or solution. This competency asks the question "How well do you work with others in order to agree on a common goal?"

Creative

Creative skills looks at the ability of the individual to think in ways that produce something new or which lead to novel ideas. This competency asks the question "How well do you find connections among unrelated data and information?"

Customer Oriented

Customer orientation implies a desire to serve both external and internal clients by focusing effort on meeting the clients needs, understanding their concerns, and seeking to build trust. This competency asks the question "How well do you understand the viewpoint and objectives of the client and attempt to build and maintain long-term relationships with the client?"

D

Decision Making

Decision making skills look at the ability of the individual to select an effective course of action while controlling resources and expenditures. This competency asks the question "How well do you evaluate information and decide on an appropriate course of action?"

Deductive Reasoning

Deductive reasoning looks at the ability of the individual to apply principles of logical or scientific thinking to a wide range of intellectual and practical problems and the ability to deal with a variety of abstract and concrete variables. This competency asks the question "How well can you arrive at a logical conclusion by applying general principles?"

Delegating Responsibility

Delegating responsibility looks at the ability of an individual to allocate authority and/or task responsibility to appropriate people to maximize the organization's and individuals' effectiveness. This competency asks the question "How well can you delegate authority to appropriate individuals as needed?"

Detail Oriented

Detail orientation looks at the ability of the individual to pay meticulous attention to all aspects of a situation or task, no matter how small or seemingly unimportant. This competency asks the question "How well do you understand and work with the 'nuts and bolts' of a task?"

Diversity Oriented

Diversity orientation looks at the ability of the individual to support the company diversity goals by using ethnic, gender, religious, or socio-economic inclusiveness. This competency asks the question "How readily do you recognize the value of a diverse workforce to an organization?"

E**Empathetic**

Empathy looks at the ability of the individual to identify with or be sensitive to the feelings and experiences of others. This competency asks the question "How well do you look at things from another's point of view?"

Energetic

Energy looks at how much force or stamina the individual can bring to the position. This competency asks the question "How much vigor or stamina do you have?"

Enthusiastic

Enthusiasm looks at the eagerness or sense of excitement the individual brings to the position. This competency asks the question "How eagerly do you approach new tasks or challenges?"

Ethical

Ethics looks at the ability of the individual to be guided by the company's accepted principles of moral conduct. This competency asks the question "How principled are you in your business and personal dealings?"

F**Financial Aptitude**

Financial aptitude looks at the ability of the individual to understand and explain economic and accounting information, prepare and manage budgets, and make sound long-term investment decisions. This competency asks the question "How well can you interpret and apply mathematical and fiscal concepts?"

Friendly

Friendliness looks at the ability of the individual to behave in a beneficial, amicable, or favorable manner toward someone. This competency asks the question "How pleasant and cheerful do you act toward others?"

G**Goal Oriented**

Goal orientation looks at the ability of the individual to act to ensure that they and others stay focused on the task objective and perform in accordance with clear expectations and goals. This competency asks the question "How focused on results are you?"

H

Honesty / Integrity

Honesty and integrity looks at the ability of the individual to act in a fair and just manner, free from deception. This competency asks the question "How truthful and fair are you in your business dealings?"

I

Initiative

Initiative looks at the ability of the individual to act and take steps to solve or settle an issue. This competency asks the question "How confident are you in making decisions on the basis of your own initiative?"

Innovative

Innovation is the ability to go beyond the conventional, a willingness to try different solutions, and to encourage new ideas from employees and co-workers. This competency asks the question "How willing are you to "work outside the box"?"

Interpersonal

Interpersonal skills look at the ability of the individual to develop and maintain relationships with others. This competency asks the question "How effectively do you relate with others?"

J

Judgment

The skill of judgment looks at the ability of the individual to form sound opinions or make decisions by evaluating available information. This competency asks the question "How do you make decisions?"

L

Leadership

Leadership skills looks at how well the individual motivates and guides others to ensure performance in accordance with clear expectations and goals. It involves attracting, supporting, developing, and retaining a talented and diverse workforce. This competency asks the question "How comfortable are you with making decisions and taking a leading role?"

Loyal

Loyalty looks at the quality of feeling a duty to or showing alliance to the organization. This competency asks the question "How devoted are you?"

M

Management Skills

Managerial skills look at the ability of the individual to achieve desired outcomes by setting goals and priorities that deliver results. This competency asks the question "How well can you achieve desired outcomes?"

Motivation

Motivational skills looks at the ability of the individual to inspire and encourage others to reach a goal. This competency asks the question "How well do you inspire yourself and others?"

N

Negotiation Skills

Negotiation skills looks at the ability of the individual to reach outcomes that gain the support and acceptance of all parties. This competency asks the question "How well can you seek a win-win solution through a process that recognizes each party's core needs?"

O

Organized

Organizational skills looks at the ability of the individual to be structured and methodical in working skills. This competency asks the question "Is your working style neat and disciplined?"

P

Patience

Patience looks at the ability of the individual to display good-natured tolerance of delay or adversity, or not being hasty when acting under strain. This competency asks the question "How well do you bear provocation, delays, or strain?"

Persistence

Persistence looks at the ability of the individual to continue in a course of action in the face of adversity. This competency asks the question "How determined are you to complete a given task?"

Persuasive

Persuasiveness looks at the ability of the individual to influence others toward some action or point of view; for example, recommending an innovative solution to a problem. This competency asks the question "How well do you present your ideas to sway others to your way of thinking?"

Presentation Skills

Presentation skills looks at the ability of the individual to effectively present information to a group. This competency asks the question "How well do you present information in front of a group?"

Problem Solving

Problem solving skills looks at the ability of the individual to recognize courses of action which can be taken to handle problems or potential problems, and applying contingency plans to solve those problems. This competency asks the question "How effectively can you think through an issue and develop a solution to a problem?"

Project Management

Project management skills looks at the ability of the individual to demonstrate an understanding of planning, organizing, staffing, directing, and controlling work tasks. This competency asks the question "How well do you direct people and control deadlines to meet a specific goal?"

R

Relationship Building

Relationship building looks at the ability of the individual to establish and maintain a good rapport and cooperative relationship with customers and co-workers. This competency asks the question "Can you work effectively with different types of people and build rapport and trust?"

Reliability

Reliability looks at the ability of the individual to be dependable and trustworthy. This competency asks the question "Do you see yourself as someone that is dependable?"

Research Skills

Research skills looks at the ability of the individual to design and conduct a systematic, objective, and critical investigation. This competency asks the question "How well are you able to conduct an independent study?"

Resilient

Resilience looks at the ability of the individual to recover from or adjust to change or misfortune. This competency asks the question "How well do you bounce back from setbacks?"

Resource Management (People & Equipment)

Resource management looks at the ability of the individual to obtain and appropriate the proper usage of equipment, facilities, materials, as well as personnel. This competency asks the question "How well can you effectively manage internal and external assets to achieve organizational goals?"

Responsible

Responsibility looks at the ability of the individual to be trustworthy or answerable for their conduct. This competency asks the question "How trustworthy and reliable are you?"

Risk Taker

Risk taking looks at how well the individual balances calculated risks against potential returns. This competency asks the question "How easily do you stretch your comfort zone?"

S**Safety Awareness**

Safety awareness looks at whether the individual identifies and corrects conditions that affect employee safety and upholds safety standards. This competency asks the question "How well can you identify and correct hazardous working conditions and safety problems?"

Sales Ability

Sales ability looks at whether an individual can use appropriate interpersonal styles and communication methods to gain acceptance of a product, service, or idea from prospects and clients. This competency asks the question "How well can you present ideas or products and move others to action or to gain agreement?"

Self Confident

Self confidence looks at the individual's belief in themselves and their abilities. This competency asks the question "How much faith do you have in your own abilities to perform a task?"

Self Motivated

Self motivational skills looks at the ability of the individual to reach a goal or perform a task with little supervision or direction. This competency asks the question "How successful are you at providing your own incentives for success?"

Strategic Planning

Strategic planning looks at the ability of an individual to develop a vision for the future and create a culture in which the long range goals can be achieved. This competency asks the question "How well can you identify fundamental values and beliefs and use them to achieve future goals?"

Systems Analysis

Systems analysis looks at the ability of the individual to determine how a system should work and how changes in conditions, operations, and the environment will affect outcomes. This competency asks the question "How well can you break down issues or problems into component parts to identify root causes and effects?"

T**Tactful**

Tactfulness looks at the ability of the individual to show consideration and avoid giving offence in dealing with others. This competency asks the question "How thoughtful and diplomatic are you in dealing with others?"

Team Builder

Team Building skills look at the ability of the individual to help ensure that team members are invested in team activities and decisions, and that the team works together to achieve a goal.

This competency asks the question "How well do you work to build and maintain team cohesion?"

Technical Aptitude

Technical aptitude looks at the ability of the individual to relate to topics which require an understanding or specialized knowledge. This competency asks the question "How well do you understand complex issues and specialized information?"

Tenacious

Tenacity looks at the willingness of the individual to adhere to a specific line of thought or action. This competency asks the question "How likely are you to commit to the completion of a job task?"

Time Management

Time management skills looks at the ability of the individual to effectively utilize available time for the completion of necessary job tasks. This competency asks the question "How efficient and productive are you in the utilization of available working time?"

Tolerance

Tolerance looks at the ability of the individual to show respect for the rights and opinions of others. This competency asks the question "How well can you work with others in the organization without being judgmental?"

Training

Training looks at the ability of the individual to develop a particular skill in others to bring them up to a predetermined standard of work performance. This competency asks the question "How well can you teach or instruct others in the area that they need assistance?"

W**Working Under Pressure**

Working under pressure looks at the ability of the individual to maintain composure when exposed to stress. This competency asks the question "How well do you handle stress in workplace situations?"

Helpful Phrases

Accuracy	Achievement	Administration
<ul style="list-style-type: none"> - Develops realistic tolerance levels - Keeps accurate records - Provides explicit documentations 	<ul style="list-style-type: none"> - Focuses on results - Achieves optimal outcomes - Exceeds the norm 	<ul style="list-style-type: none"> - Establishes effective systems for record retention - Capably manages records retention program giving proper attention to legal, tax and operational concerns - Is highly skilled in electronic records management - Avoids burdening management with administrative details
Analytical Skills	Coaching and Counseling	Communication Skills
<ul style="list-style-type: none"> - Excels in tedious research - Applies sound analytical thinking - Is very methodical in solving problems 	<ul style="list-style-type: none"> - Is highly respected by employees for sharing concerns, problems and opportunities - Lends support and guidance to employees - Gives helpful guidance to employees - Assists employees in career assessment 	<ul style="list-style-type: none"> - Excels in effective and positive communications - Keeps meetings action-oriented - Asks penetrating questions - Is an empathetic listener - Effectively communicates with co-workers
Competency	Computer Skills	Cooperation
<ul style="list-style-type: none"> - Focuses on core competencies - Demonstrates strong personal effectiveness - Attends seminars and workshops to improve personal competence 	<ul style="list-style-type: none"> - Keeps alert to new computer hardware - Keeps abreast of new software applications - Makes effective use of on-line resources 	<ul style="list-style-type: none"> - Is extremely cooperative with associates - Builds cooperation - Promotes productive cooperation - Displays a harmonious and cooperative spirit
Cost Management	Creativity	Decision Making
<ul style="list-style-type: none"> - Controls expenses without lowering accomplishments - Displays sound judgment in managing and controlling expenses - Effectively commits resources of staff, funds and time 	<ul style="list-style-type: none"> - Successfully develops creative strategies - Welcomes ideas from subordinates - Is receptive to new ideas - Is willing to change - Excels in nurturing new ideas - Understands "ambiguity and change" and how these critical concepts impact the organization 	<ul style="list-style-type: none"> - Makes decisions with confidence - Concentrates on developing solutions - Encourages decision making at lowest possible level
Delegating	Dependability	Development
<ul style="list-style-type: none"> - Provides subordinates with the resources needed to accomplish results - Encourages subordinates to solve their own problems - Creates a high degree of trust with subordinates 	<ul style="list-style-type: none"> - Fully accepts all responsibilities and meets deadlines - Can be relied upon to accomplish the best possible results - Generates greater success in highly complex situations 	<ul style="list-style-type: none"> - Is eager to participate in professional development programs - Displays an ability to turn weaknesses into strengths - Encourages employees to become promotable
Environmental, Safety and Security	Evaluation Skills	Goals and Objectives
<ul style="list-style-type: none"> - Closely follows all safety regulations - Excels in accident prevention management - Adheres to all security policies 	<ul style="list-style-type: none"> - Accurately assesses potential - Rates on the basis of performance and not personality - Effectively rates job performance 	<ul style="list-style-type: none"> - Effectively communicates objectives - Sets compelling personal goals - Keeps employees focused on achieving goals

	and not the individual - Carefully limits all evaluations to on-the-job performance - Understands accomplishments, strengths and weaknesses of employees	
Improvement	Initiative	Innovation
- Is continuously planning for improvement - Promotes improvement-oriented ideas - Uses constructive criticism to improve performance - Establishes goals for improvement of performance targets - Displays improved potential for advancement	- Explores new opportunities - Requires minimum supervision - Extremely active and eager to try new approaches	- Excels in developing innovative and creative solutions - Seeks continuous innovation - Excels in innovative thinking
Interpersonal Skills	Judgment	Knowledge
- Excels in effective human relations - Recognizes the needs of others - Excels in obtaining enthusiastic commitments - Develops positive working relationships - Promotes harmony among associates - Promotes participative approaches	- Excels in making appropriate judgments - Can be trusted to use good judgment - Exercises sound judgment on behalf of others	- Clearly understands purposes, objectives, practices and procedures of department - Demonstrates a strong, functional knowledge - Keeps well informed on business, political and social issues
Leadership	Learning Ability	Loyalty and Dedication
- Is able to quickly gain the support of others - Inspires confidence and respect - Leads with authority and respect - Shows appreciation for contributions and achievements - Promotes harmony and teamwork	- Is eager to enhance skill levels - Benefits from all learning situations - Is committed to continuous learning - Is continuously learning through educational and professional improvement programs	- Takes pride in job - Is highly devoted to achieving objectives - Displays a high degree of honesty, loyalty and integrity
Management Ability	Maturity	Mental Skills
- Effectively uses contemporary management concepts / ideas - Encourages participative management - Is a powerful asset to the organization - Identifies major management problems - Is a polished and effective executive - Avoids managing by crisis - Recognizes the differences between managing and doing - Effectively manages change	- Copes constructively with emotions - Avoids overreacting - Keeps anger under control - Confronts reality	- Uses common sense to reach workable conclusions - Displays imaginative thinking - Excels in heuristic thinking - Thinks futuristically
Motivation	Negotiating Skills	Oral Expression
- Displays strong achievement drive - Is realistically enthusiastic - Accentuates the positive - Displays energy and vitality in performing daily responsibilities - Views problems as opportunities Is results/outcomes oriented	- Excels in negotiating fair resolutions - Is a key facilitator - Reconciles differences without creating resentment - Handles confrontations with tact	- Excels in impromptu speaking situations - Communicates with ease and a natural style - Speaks with enthusiasm and confidence

Organizing	Personal Qualities	Persuasiveness
<ul style="list-style-type: none"> - Makes the most of organizational energy and potential - Demonstrates a systematic approach in carrying out assignments - Exerts a positive influence on the organizational climate 	<ul style="list-style-type: none"> - Has a calm, even temperament - Is sincere - Possesses all traits associated with excellence 	<ul style="list-style-type: none"> - Persuades with tact - Writes with persuasion - Persuades without antagonizing
Planning	Potential	Presentation Skills
<ul style="list-style-type: none"> - Effectively plans work schedules to balance peak and slack periods - Keeps comfortably ahead of work schedule - Excels in developing tactical action plans - Is very skilled in turning theory into action plans - Plans for the unexpected - Focuses on the future 	<ul style="list-style-type: none"> - Displays high management potential - Is capable of assuming greater challenges - Displays a high energy potential - Is enhancing growth potential through additional education and training 	<ul style="list-style-type: none"> - Delivers presentations with enthusiasm and energy - Is able to present dry and technical information - Continuously strives to improve presentation skills
Prioritizing	Problem Solving	Productivity
<ul style="list-style-type: none"> - Excels in eliminating unproductive activities - Recognizes the need to concentrate on people rather than tasks - Is able to distinguish between crucial and trivial - Sees the big picture - Places organizational needs ahead of personal convenience 	<ul style="list-style-type: none"> - Displays a practical approach to solving problems - Effectively solves problems rather than symptoms - Works well with others in solving problems 	<ul style="list-style-type: none"> - Demonstrates consistently distinguished performance - Is an abundant producer - Sustains a high achievement level
Professionalism	Project Management	Quality
<ul style="list-style-type: none"> - Continuously seeks to broaden professional horizons - Develops the skills needed to maintain the highest standards of professional excellence - Develops enduring professional relationships - Projects poise and authority - Writing reflects a polished professional appearance 	<ul style="list-style-type: none"> - Clearly establishes project goals and objectives - Keeps management fully informed of a project's progress - Is able to keep programs and projects running smoothly 	<ul style="list-style-type: none"> - Is fully committed to quality assurance - Excels in detecting flaws or imperfections - Strives for state-of-the-art perfection
Resourcefulness	Responsibility	Stress
<ul style="list-style-type: none"> - Effectively matches goals to resources - Effectively assesses employee resources, strengths and competences - Makes optimum use of department resources - Effectively uses all information sources 	<ul style="list-style-type: none"> - Accepts full responsibility for results - Continues to seek and accept responsibility - Seizes responsibility without causing seizures in either subordinates or himself/herself - Eagerly seeks formidable challenges 	<ul style="list-style-type: none"> - Successfully handles multiple demands from superiors and subordinates - Copes effectively with pressures and tensions - Maintains coolness despite annoyances - Works effectively in high pressure situations - Keeps calm and professional under the toughest circumstances - Handles crises with composure - Recognizes stress-related problems - Recognizes the importance of sound physical and mental health for top performance
Supervisory Skills	Tact and Diplomacy	Team Skills

<ul style="list-style-type: none"> - Effectively motivates subordinates to exert the effort necessary to attain organizational goals - Brings out the best in employees - Makes certain that employees have a clear understanding of their responsibilities - Makes maximum use of personnel and equipment - Keeps employees challenged through job enrichment - Develops a climate providing motivation, participation and opportunities for employee initiative - Promotes a comfortable, friendly organizational atmosphere - Avoids over-supervising - Capably manages diverse personalities - Supervises firmly and fairly - Disciplines without causing resentment - Is skilled in conflict resolution - Applies all rules and regulations fairly - Copes effectively with misunderstandings 	<ul style="list-style-type: none"> - Handles sensitive situations with confidence - Is very tactful when facing confrontation - Displays trust and mutual understanding - Conveys sincere appreciation at every opportunity 	<ul style="list-style-type: none"> - Capitalizes on the talents of all team members - Makes maximum use of the diverse talents of team members - Is a strong team builder - Excels in developing harmony and greater productivity
Technical Skills	Time Management	Versatility
<ul style="list-style-type: none"> - Builds a strong sense of technical teamwork and purpose - Effectively blends management skills with technical expertise - Keeps informed of new technologies in office automation 	<ul style="list-style-type: none"> - Avoids becoming involved in endless details - Makes effective use of supervisors' time and resources - Works smarter, not harder - Doesn't "major in the minors" 	<ul style="list-style-type: none"> - Has the ability to perform a wide range of assignments - Is very capable of handling a multitude of situations - Is able to provide broad organizational support in many areas - Is intrinsically comfortable with ambiguity and change
Vision	Writing Ability	
<ul style="list-style-type: none"> - Develops vision statements that reflect realistic solutions - Displays visionary leadership skills - Displays long-range/long-term vision - Develops strategic vision - Excels in visionary strategies 	<ul style="list-style-type: none"> - Writes in a positive manner to reflect favorably upon the organization - Possesses a large vocabulary - Is highly skilled in preparing reports and proposals 	