

# Employee Appraisal Form Example

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## Performance Assessment Form

<b>Team Member:</b> Jane Doe		<b>Title:</b> Corporate Travel Leader	<b>Location:</b> Brisbane Corporate Office			
<b>Team Leader:</b> John Doe		<b>Title:</b> General Manager	<b>Appraisal Period:</b> Jan-Dec 2010			
<b>OBJECTIVES:</b> <i>Summarise all key objectives. Assign % weighting for each bonus related objective</i>	<b>Weight (%)</b>	<b>TEAM MEMBER'S COMMENTS ON RESULTS ACHIEVED AGAINST OBJECTIVES</b> <i>Describe results, process improvements and business factors impacting results.</i>	<b>TEAM LEADER'S COMMENTS AND PERFORMANCE ASSESSMENT:</b> <i>Consider actual results and process improvements and feedback from customers. Highlight competencies used in achievement of objectives, competencies this person should continue to demonstrate. Make note of improvement areas they must address</i>	<b>Rating (%)</b>		
<b>1. Contribution to Margin Reduction:</b>  <b>Air Travel Arrangements</b> · Review and renegotiate all domestic and international air travel arrangements with bulk carriers – reduce outgoings by 7% (End Q4)  <b>Hotel Agreements</b> · Negotiate preferred hotel agreements in Asia Pacific Region – reduce number of vendors and cost by 10% negotiate terms and conditions of business – (End Q2)	50%         30%	Negotiated a pre-booked bulk buying arrangement with one domestic and two international carriers which has reduced the average cost per trip by 2.25% although other suppliers also still being used         Formed strategic partnership with one major hotel chain on a regional basis, which has reduced vendor activity by 50% and cost by at least 10%. Provided improved trading terms. Arrangement is being reviewed by Global Corporate office with a view to wider international application	John has achieved a marginal improvement in the overall cost of domestic and international air travel, however, further work remains to be done to maximise efficiency         Excellent results which both simplifies administrative arrangements and reduces cost	60         100		
<b>2. Contribution to High Performance Learning Organization</b>  · Arrange August Global IT Conference – propose venue, coordinate travel arrangements for all delegates internationally			10%	Preparatory work completed for Global IT Conference, tentative arrangements made, but conference cancelled by Global IT	Not applicable due to cancellation of conference	N/A
<b>3. Contribution to Best Place to Work</b>  · Review Travel Insurance claims and settlements – renegotiate arrangements to ensure faster settlement of claims, minimize administrative involvement (End Q3)	10%	Changed Travel Insurance Provider Aug who guarantee determination of claims within 14 days, employees forward claims directly to insurer	New travel insurance arrangements reduce direct involvement of company team members, should result in improved claims management	80		
Rating %: Weighting x rating, summed & divided by 100				77%		

## Performance Assessment Form

**COMPETENCY ASSESSMENT:** *Highlight behaviours, knowledge and skills used and needed in achieving overall performance.*

**Strongest Competencies:**(specify at least three)

Negotiation  
Analytical Skills  
Planning/Priority Setting

**Competencies which are not core strengths:** (specify at least three)

Strategy/Vision  
Consulting  
Communication

**Comments:**

Strengths come from extensive knowledge of the travel industry and its technical requirements

**Comments:**

Achievements sometimes limited by  
a) insufficient prior consultation with internal customers  
b) communication of new arrangements

### EVALUATE HOW WELL THE INDIVIDUAL DEMONSTRATES THE 'LEADING WITH RESPECT' PRINCIPLES

①②③④ <input checked="" type="checkbox"/>	EXCEPTIONAL	EXCEEDS EXPECTATIONS	MEETS EXPECTATIONS	BELOW EXPECTATIONS	NOT APPLICABLE
Communicates effectively	1	2	3	4	N/A
Gives and seeks feedback	1	2	3	4	N/A
Values unique contributions	1	2	3	4	N/A
Promotes teamwork	1	2	3	4	N/A
Sets the example	1	2	3	4	N/A
<b>Overall 'Leading with Respect'</b>	1	2	3	4	N/A

## Performance Assessment Form

### OVERALL PERFORMANCE RATING

Indicate the overall performance rating considering achievement of all objectives, use of competencies in achieving performance results, and principles of valuing people.

PERFORMANCE RATING	DEFINITIONS	RATING
1. <b>Exceptional (EX)</b>	Consistently and significantly exceeds expectations. Rarely requires guidance. Contributed significantly to the team's achievements and to the growth and development of others. Demonstrated continuous improvement and competencies that others strive to emulate.	<b>101% - 115%</b>
2. <b>Exceeds expectations (EE)</b>	Consistently meets and frequently exceeds expectations. Requires only occasional guidance. Performed certain elements of the objectives in an exceptional manner. Contributed to teamwork and to the growth and development of others. Demonstrated effective use and continuous improvement of required competencies to achieve business results.	<b>86% - 100%</b>
3. <b>Meets expectations (ME)</b>	Meets and occasionally exceeds expectations. Requires only a normal amount of guidance. Accomplishments consistently met the performance standards of the organisation.	<b>50% - 85%</b>
4. <b>Below expectations (BE)</b>	Inadequate results achieved. Some agreed key objectives not completed or fell short of acceptable standards. Required considerable supervision. Weakened the ability of the team to meet business and customer requirements. A performance improvement programme should be initiated by the Team Leader; continued poor performance may lead to termination of employment	<b>0%</b>

☐ EXCEPTIONAL (EX)
 ☐ EXCEEDS EXPECTATIONS (EE)
 ☒ MEET EXPECTATIONS (ME)
 ☐ BELOW EXPECTATIONS (BE)

Development Actions Completed: (since last development plan was discussed) Timetable (Q/Y)	Development Actions Planned: Timetable (Q/Y)
Attended Excel Course – Quarter 2	Attend Strategic Management Course (before end Q2) Work with Mary Sue to ensure air travel presentations are delivered to internal customers at least monthly

## Performance Assessment Form

INDIVIDUAL DEVELOPMENT	
TEAM MEMBER'S comments on career interests (short-term goals; and longer term goals if known):    Ability to relocate (internationally or within current country)	LEADER'S comments on future career opportunities:

GENERAL COMMENTS: (including career interest / career goals)		
<b>TEAM LEADER:</b>	<b>TEAM MEMBER:</b>	<b>NEXT LEVEL MANAGER:</b>
SIGNATURE: .....	SIGNATURE: .....	SIGNATURE: .....
DATE: .....	DATE: .....	DATE: .....