Organization Performance Evaluation System

While conversations between managers and staff members about performance and development should be frequent, our performance evaluation system ensures that a more formal, summary conversation takes place at least once a year. These conversations give managers and staff members an opportunity to reflect on expectations, the manager/staff relationship, and overall performance.

Our performance evaluation template consists of four main sections:

1. **Results (what you got done):** What was their progress in reaching key goals for the year?
2. **Performance Factors (how you got it done):** How are they demonstrating our core values and utilizing skills essential to the position?
3. **Assessment (overall, how well you did + next steps):** How did they do overall? What does the path forward look like?
4. **Manager Feedback/Reflection:** What did you (the manager) do well to support them? How can you better support them moving forward?

# Ratings

The following scale is used for all ratings in the review:

* **Exceeds expectations**: Consistently delivers exceptional results; is a model for others to follow.
* **Meets expectations**: Consistently meets expectations in all areas.
* **Partially meets expectations**: Meets expectations in some areas and needs improvement in others.
* **Does not meet expectations**: Needs significant improvement quickly.

# Process

Performance reviews normally occur in December and January so we can reflect on results against annual objectives. During the evaluation process, managers will review staff members’ work products and the results they have achieved. In addition, managers may also reach out to staff members’ teams, colleagues from other departments, and/or people outside the organization for additional feedback.

# Customizing this tool

This template is intended for use by both managers to assess their staff and for staff members to self-evaluate and share feedback with their manager. To get the most use out of this tool, feel free to add or remove sections as you see fit. Insert all of the goals, team or organizational values, and core competencies that you have set expectations for. You may also consider outlining the timeline for your process (including key deadlines) in the “process” section above.

# Key Resources

* [Four Ways to Mitigate Bias in Performance Evaluations](http://www.managementcenter.org/article/four-ways-to-mitigate-bias-in-performance-evaluations/)
* [Eight-Step Guide to Performance Evaluations for Managers](http://www.managementcenter.org/article/eight-step-guide-to-performance-evaluations-for-managers/)
* [360 Feedback Field Guide for Managers](http://www.managementcenter.org/resources/360-feedback-a-field-guide-for-managers/)
* Sample Performance Evaluation Form: [Corrective](http://www.managementcenter.org/resources/completed-performance-evaluation-corrective-assessment/) and [Strong](http://www.managementcenter.org/resources/completed-performance-evaluation-strong-assessment/)
* [ED Evaluation Form](http://www.managementcenter.org/resources/sample-ed-performance-evaluation-form/)

Performance Evaluation Form

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| --- | --- | --- | --- |
| **Employee Name, Position** |  | | |
| **Manager Name, Position** |  | | |
| **Review Period** |  | **Review Date** |  |
| **Reviewed by** | \_\_ Self \_\_ Manager | | |

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| **1. Getting Results** | | |
| **Goal[[1]](#footnote-1)**  *Note: Put each goal in a separate row, adding more rows as needed. If you’d like, you can mark the most important goals in bold.* | **Result** | **Rating**  **E: *exceeds expectations***  **M: *meets expectations***  **P: *partially meets expectations***  **D: *Does not meet expectations*** |
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| **Comments *(optional)*: To what extent did you/the staff member achieve the goals for the position this past period?** | | |

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| **2. Demonstrating Performance Factors** |
| ***To what degree did you / the staff member demonstrate the following core values and competencies?*** |

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| --- | --- | --- |
| **Core Values**  *Add more rows as needed* | **Description of Value** | **Rating**  **(E, M, P, D, N/A)** |
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| **Core Competencies**  *Add more rows as needed* | **Description of Competency** | **Rating**  **(E, M, P, D, N/A)** |
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| **Comments *(optional)*: In what priority areas of performance (values and competencies) did you / the staff member excel? In what areas is improvement needed?** |

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| **3. Summary Assessment, Next Steps, and Trajectory at Organization** |
| **Overall performance rating:**  \_\_ Exceeds Expectations \_\_ Meets Expectations  \_\_ Partially Meets Expectations \_\_ Does Not Meet Expectations |
| **Comments** *(Note: if you—the manager—conducted 360 feedback or solicited input from others, use this section to summarize themes and highlights in addition to your own assessment.)*   1. **What are 1-3 notable areas of strength?** 2. **What are 1-3 areas of growth or improvement?** 3. **What do you see as your / the staff member’s trajectory in the organization? What are the next steps?** |

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| **4. Feedback for Manager / Manager Self-Reflection** |
| **What have you / the manager done well or effectively to provide support to the staff member?**  **What might you / the manager have done differently?**  **What support is needed from you / the manager moving forward?** |

1. If the staff member didn’t set formal goals for the year, fill in each of the staff member’s key areas of work and assess to what extent their accomplishments represent significant progress in that area. [↑](#footnote-ref-1)