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
Employee Questions 2014

<table>
<thead>
<tr>
<th>Ratings Description</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exceeds Expectations</td>
<td>5</td>
</tr>
<tr>
<td>Above Expectations</td>
<td>4</td>
</tr>
<tr>
<td>Meets Expectations</td>
<td>3</td>
</tr>
<tr>
<td>Needs Improvement</td>
<td>2</td>
</tr>
<tr>
<td>Below Expectations</td>
<td>1</td>
</tr>
</tbody>
</table>

**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 (Viking Academy, 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.


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.
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: O Six Months   O 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.

<table>
<thead>
<tr>
<th>Objectives</th>
<th>Performance Results</th>
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</thead>
<tbody>
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</tbody>
</table>
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?

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

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

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

O Exceptional

O Exceeds Objectives

O Expected Performance

O Marginal/Needs Improvement

O 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:
______________________________________________________________________________
______________________________________________________________________________
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______________________________________________________________________________

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

Comments:
______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________
2015 Performance Appraisal Template Samples

Human Resources Peer Networking Benchmarks

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

<table>
<thead>
<tr>
<th>Category</th>
<th>Self-Rating</th>
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<tbody>
<tr>
<td>a. Technical Skills (job/discipline area specific)</td>
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<td>b. Technical Knowledge</td>
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<tr>
<td>(up-to-date on industry/discipline news, articles and best practices)</td>
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</tr>
<tr>
<td>c. Quality of Work Product (comprehensive, accurate, timely, etc.)</td>
<td></td>
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<tr>
<td>d. Utilization or Productivity</td>
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<tr>
<td>e. Business Development</td>
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</tbody>
</table>
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: __________.
2015 Performance Appraisal
Template Samples

Human Resources Peer Networking Benchmarks

Example 4
Production Performance Appraisal

Name: _________________________ Date:_____________

Job Title: _______________________________________________

Department:____________________________________________

Review Period: From________ To________

Date of Hire:______________

Type of Evaluation: O Six Months   O Annual   O 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.

<table>
<thead>
<tr>
<th>Core Values</th>
<th>0-Not meeting core value</th>
<th>1-Meeting core value</th>
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<tbody>
<tr>
<td>Integrity</td>
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<td>Leadership</td>
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<td>Improvement</td>
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</table>

Page 1 of 6
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.

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<thead>
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<th>Rating</th>
<th>Scale</th>
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</table>

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

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

<table>
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<th>Rating</th>
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*Do not include core values rating in overall rating calculation.*
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).

<table>
<thead>
<tr>
<th>Rating</th>
<th>Scale</th>
<th>Points</th>
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E. Initiative: The extent in which an employee seeks out new assignments and assumes additional duties when necessary.

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<th>Rating</th>
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<th>Points</th>
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</table>

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.

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<tr>
<th>Rating</th>
<th>Scale</th>
<th>Points</th>
<th>Comments:</th>
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</table>
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)?**

<table>
<thead>
<tr>
<th>Rating</th>
<th>Scale</th>
<th>Points</th>
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</table>

**Comments:**

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?

<table>
<thead>
<tr>
<th>Rating</th>
<th>Scale</th>
<th>Points</th>
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<tbody>
<tr>
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</table>

**Comments:**

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?

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<th>Rating</th>
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</table>

**Comments:**

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Page 4 of 6
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)?

<table>
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<tr>
<th>Rating</th>
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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

Human Resources Peer Networking Benchmarks

Example 5
## PERFORMANCE EVALUATION FORM

### 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 Associate’s 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.

<table>
<thead>
<tr>
<th>Goals set at last performance evaluation</th>
<th>Associate Comments:</th>
<th>Manager/Supervisor Comments:</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
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</table>
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.

<table>
<thead>
<tr>
<th>Performance Competencies</th>
<th>Associate Comments:</th>
<th>Manager/Supervisor Comments:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Safety and Security Awareness</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is aware of conditions that affect</td>
<td></td>
<td></td>
</tr>
<tr>
<td>safety as well as the organization’s</td>
<td></td>
<td></td>
</tr>
<tr>
<td>security, and takes appropriate</td>
<td></td>
<td></td>
</tr>
<tr>
<td>action as necessary.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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).

<table>
<thead>
<tr>
<th>GOAL</th>
<th>ACTION (OR TASK)</th>
<th>TIME FRAME</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

Human Resources Peer Networking Benchmarks

Example 6
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)
2015 Performance Appraisal Template Samples

Human Resources Peer Networking Benchmarks

Example 7
Employee Evaluation Form

Employee Name: __________________________________________ Hire Date: ________________________________

Position: ___________________________________________ Prepared by: ________________________________

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

Evaluate Job Performance

1. Job Knowledge: 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.

   Rating (circle one) 1 2 3 4 5

2. Quality of Work: 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?

   Rating (circle one) 1 2 3 4 5

3. Analytical/Problem Solving Skills: 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.

   Rating (circle one) 1 2 3 4 5

4. Initiative: 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.

   Rating (circle one) 1 2 3 4 5

5. Productivity: 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.

   Rating (circle one) 1 2 3 4 5

6. Planning and Organization: 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.

   Rating (circle one) 1 2 3 4 5

Evaluate Behavioral Skills

1. Attendance: Employee comes to work when scheduled. Employee shows flexibility to work overtime.

   Rating (circle one) 1 2 3 4 5

2. Punctuality: Employee observes prescribed hours and is punctual.

   Rating (circle one) 1 2 3 4 5

3. Working Relationships: 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 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
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.

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.

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.

|     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |     |
|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| 1   | 1.5 | 2   | 2.5 | 3   | 3.5 | 4   | 4.5 | 5   |

**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.

_______________________________________________________________________________________________
_______________________________________________________________________________________________
_______________________________________________________________________________________________
_______________________________________________________________________________________________
_______________________________________________________________________________________________

N:\Forms\Corporate Masters\Employee Evaluation.doc  Rev. 8/3/00
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: ____________________________
2015 Performance Appraisal Template Samples

Human Resources Peer Networking Benchmarks

Example 8
## PERFORMANCE APPRAISAL

<table>
<thead>
<tr>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Job Title:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date of Hire:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Appraisal By:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Appraisal Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

### Appraisal Type:
- [ ] Mid-Year
- [ ] Year-End
- [ ] Peer
- [ ] Other
- [ ] Supervisor / Manager

### RATING CRITERIA

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

### INDIVIDUAL WORK ETHIC

#### Considerations:
- Displays desire to satisfy the Customer (both internal and external) and to “Exceed Expectations” 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

<table>
<thead>
<tr>
<th>Appraiser’s Rating</th>
<th>Comments to Support Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self:</td>
<td>Strengths (Self):</td>
</tr>
<tr>
<td></td>
<td>Opportunity for Improvement (Self):</td>
</tr>
<tr>
<td>Supervisor / Manager:</td>
<td>Strengths (Supervisor / Manager):</td>
</tr>
<tr>
<td></td>
<td>Opportunity for Improvement (Supervisor / Manager):</td>
</tr>
</tbody>
</table>

### 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

<table>
<thead>
<tr>
<th>Appraiser’s Rating</th>
<th>Comments to Support Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self:</td>
<td>Strengths (Self):</td>
</tr>
<tr>
<td></td>
<td>Opportunity for Improvement (Self):</td>
</tr>
<tr>
<td>Supervisor / Manager:</td>
<td>Strengths (Supervisor / Manager):</td>
</tr>
<tr>
<td></td>
<td>Opportunity for Improvement (Supervisor / Manager):</td>
</tr>
</tbody>
</table>
### 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.

<table>
<thead>
<tr>
<th>Appraiser's Rating</th>
<th>Comments to Support Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Self:</strong></td>
<td>Strengths (Self):</td>
</tr>
<tr>
<td></td>
<td>Opportunity for Improvement (Self):</td>
</tr>
<tr>
<td><strong>Supervisor / Manager:</strong></td>
<td>Strengths (Supervisor / Manager):</td>
</tr>
<tr>
<td></td>
<td>Opportunity for Improvement (Supervisor / Manager):</td>
</tr>
</tbody>
</table>

### 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.

<table>
<thead>
<tr>
<th>Appraiser's Rating</th>
<th>Comments to Support Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Self:</strong></td>
<td>Strengths (Self):</td>
</tr>
<tr>
<td></td>
<td>Opportunity for Improvement (Self):</td>
</tr>
<tr>
<td><strong>Supervisor / Manager:</strong></td>
<td>Strengths (Supervisor / Manager):</td>
</tr>
<tr>
<td></td>
<td>Opportunity for Improvement (Supervisor / Manager):</td>
</tr>
</tbody>
</table>

### OVERALL PERFORMANCE RATING

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

### INDIVIDUAL GOALS & CONTINUOUS IMPROVEMENT PROJECTS (if applicable)

<table>
<thead>
<tr>
<th>GOAL or PROJECT</th>
<th>COMPLETION (Month/Year)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Employee Signature: ___________________________ Date: ____________

Supervisor / Manager Signature: ___________________________ Date: ____________

Human Resources Signature: ___________________________ Date: ____________
2015 Performance Appraisal Template Samples

Human Resources Peer Networking Benchmarks

Example 9
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.

<table>
<thead>
<tr>
<th>Specific</th>
<th>Become more proficient in Excel.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Measurable</td>
<td>Utilize Excel in tracking employee training programs.</td>
</tr>
<tr>
<td>Actionable</td>
<td>By attending training programs offered through the ATC, the employee will learn how to build an Excel database.</td>
</tr>
<tr>
<td>Realistic</td>
<td>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.</td>
</tr>
<tr>
<td>Time Bound</td>
<td>Complete by January 1, 2014 for next year’s appraisal process.</td>
</tr>
</tbody>
</table>
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 ☐ 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.

<table>
<thead>
<tr>
<th>Employee’s Signature:</th>
<th>Date:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supervisor’s Signature:</td>
<td>Date:</td>
</tr>
</tbody>
</table>
2015 Performance Appraisal Template Samples

Human Resources Peer Networking Benchmarks

Example 10
**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

<table>
<thead>
<tr>
<th>Competency</th>
<th>5 - Exceptional</th>
<th>4 - Highly Effective</th>
<th>3 - Proficient</th>
<th>2 - Inconsistent</th>
<th>1 - Unsatisfactory</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Performance is consistently superior and significantly exceeds position requirements.</td>
<td>Performance frequently exceeds position requirements.</td>
<td>Performance consistently meets position requirements.</td>
<td>Performance meets some, but not all position requirements.</td>
<td>Performance consistently fails to meet minimum position requirements; employee lacks skills required or fails to utilize necessary skills.</td>
</tr>
</tbody>
</table>

**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.  
   Additional comments: □ □ □ □ □

2. Looks for unsafe conditions and helps to resolve them or notifies the proper person of the condition.  
   Additional comments: □ □ □ □ □

3. Knows the Lockout/Tag out procedures and follows them accordingly.  
   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.  
   Additional comments: □ □ □ □ □

5. Notifies proper people and uses time effectively when machines are down.  
   Additional comments: □ □ □ □ □

6. Keeps accurate count of production and scrap. Properly records this on Score Boards.  
   Additional comments: □ □ □ □ □
| Quality/Job Knowledge |  |  |  |  |  |
|-----------------------|-----------------|------------------|----------------|------------------|
| **7.** Understands the necessary criteria to identify and produce an acceptable part, including first piece approval (FPA) process | [ ] | [ ] | [ ] | [ ] | [ ] |
| Additional comments: |  |  |  |  |  |
| **8.** Uses the MOM Book appropriately | [ ] | [ ] | [ ] | [ ] | [ ] |
| Additional comments: |  |  |  |  |  |
| **9.** Demonstrates effective problem solving ability while also knowing when to use help chain by contacting lead operator | [ ] | [ ] | [ ] | [ ] | [ ] |
| Additional comments: |  |  |  |  |  |

| Team Work |  |  |  |  |  |
|-----------|-----------------|------------------|----------------|------------------|
| **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) | [ ] | [ ] | [ ] | [ ] | [ ] |
| Additional comments: |  |  |  |  |  |
| **11.** When necessary, offers assistance and support to co-workers (does not waste time) | [ ] | [ ] | [ ] | [ ] | [ ] |
| Additional comments: |  |  |  |  |  |
| **12.** Works actively to resolve conflicts and stays away from “rumor mills” | [ ] | [ ] | [ ] | [ ] | [ ] |
| Additional comments: |  |  |  |  |  |

| Attendance |  |  |  |  |  |
|------------|-----------------|------------------|----------------|------------------|
| **13.** Maintains regular attendance | [ ] | [ ] | [ ] | [ ] | [ ] |
| Number of tardies (in last year):  Number of unexcused absences: |  |  |  |  |  |
| **14.** Begins work on time (is at work location on time) | [ ] | [ ] | [ ] | [ ] | [ ] |
| Additional comments: |  |  |  |  |  |
| **15.** Takes brakes appropriately | [ ] | [ ] | [ ] | [ ] | [ ] |
| Additional comments: |  |  |  |  |  |
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 Instructions:
Please complete and return this 3 page self evaluation to Margaret 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 your 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.

<table>
<thead>
<tr>
<th>Specific</th>
<th>Become more proficient in Excel.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Measurable</td>
<td>Utilize Excel in tracking employee training programs.</td>
</tr>
<tr>
<td>Actionable</td>
<td>By attending training programs offered through the ATC, the employee will learn how to build an Excel database.</td>
</tr>
<tr>
<td>Realistic</td>
<td>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.</td>
</tr>
<tr>
<td>Time Bound</td>
<td>Complete by January 1, 2014 for next year’s appraisal process.</td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>Technology Training</th>
<th>Writing Skills</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communication Skills</td>
<td></td>
</tr>
<tr>
<td>Time Management/Organization</td>
<td></td>
</tr>
<tr>
<td>Supervisory Training</td>
<td>Leadership Development</td>
</tr>
</tbody>
</table>

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.*

<table>
<thead>
<tr>
<th>Employee’s Signature:</th>
<th>Date:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supervisor’s Signature:</td>
<td>Date:</td>
</tr>
</tbody>
</table>
2015 Performance Appraisal Template Samples

Human Resources Peer Networking Benchmarks

Example 12
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

<table>
<thead>
<tr>
<th>Performance Competencies</th>
<th>Rating</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 - Exceptional:</td>
<td></td>
<td>Performance is consistently superior and significantly exceeds position requirements.</td>
</tr>
<tr>
<td>4 - Highly Effective:</td>
<td></td>
<td>Performance frequently exceeds position requirements.</td>
</tr>
<tr>
<td>3 - Proficient:</td>
<td></td>
<td>Performance consistently meets position requirements.</td>
</tr>
<tr>
<td>2 - Inconsistent:</td>
<td></td>
<td>Performance meets some, but not all position requirements.</td>
</tr>
<tr>
<td>1 - Unsatisfactory:</td>
<td></td>
<td>Performance consistently fails to meet minimum position requirements; employee lacks skills required or fails to utilize necessary skills.</td>
</tr>
</tbody>
</table>

**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. □ □ □ □ □
   Additional comments:

2. Looks for unsafe conditions and helps to resolve them or notifies the proper person of the condition □ □ □ □ □
   Additional comments:

3. Knows the Lockout/Tag out procedures and follows them accordingly □ □ □ □ □
   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 □ □ □ □ □
   Additional comments:

5. Notifies proper people and uses time effectively when machines are down. □ □ □ □ □
   Additional comments:

6. Keeps accurate count of production and scrap. Properly records this on Score Boards □ □ □ □ □
   Additional comments:
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.

<table>
<thead>
<tr>
<th>Quality/Job Knowledge</th>
<th>5 - Exceptional</th>
<th>4 - Highly Effective</th>
<th>3 - Proficient</th>
<th>2 - Inconsistent</th>
<th>1 - Unsatisfactory</th>
</tr>
</thead>
<tbody>
<tr>
<td>Produce and pack defect free products that meet the customer specifications.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

7. Understands the necessary criteria to identify and produce an acceptable part, including first piece approval (FPA) process
   Additional comments:

8. Uses the MOM Book appropriately
   Additional comments:

9. Demonstrates effective problem solving ability while also knowing when to use help chain by contacting lead operator
   Additional comments:

<table>
<thead>
<tr>
<th>Team Work</th>
<th>5 - Exceptional</th>
<th>4 - Highly Effective</th>
<th>3 - Proficient</th>
<th>2 - Inconsistent</th>
<th>1 - Unsatisfactory</th>
</tr>
</thead>
<tbody>
<tr>
<td>The demonstrated ability to successfully support, communicate with, influence and work with others while focusing on company goals and objectives.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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)
    Additional comments:

11. When necessary, offers assistance and support to co-workers (does not waste time)
    Additional comments:

12. Works actively to resolve conflicts and stays away from “rumor mills”
    Additional comments:

<table>
<thead>
<tr>
<th>Attendance</th>
<th>5 - Exceptional</th>
<th>4 - Highly Effective</th>
<th>3 - Proficient</th>
<th>2 - Inconsistent</th>
<th>1 - Unsatisfactory</th>
</tr>
</thead>
<tbody>
<tr>
<td>The extent to which the employee can be depended upon to be available for work and to fulfill position responsibilities.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

13. Maintains regular attendance
    Number of tardies (in last year): Number of unexcused absences:

14. Begins work on time (is at work location on time)
    Additional comments:

15. Takes breaks appropriately
    Additional comments:
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:  
Supervisor’s Signature:  

Date:  
Date:
2015 Performance Appraisal Template Samples

Human Resources Peer Networking Benchmarks

Example 13
Performance reviews / Differentiation Spring 2015

• **AGENDA**
  2. Development / Succession Planning
  3. Performance Improvement Plans
## Spring 2015 Timing & Action

### Annual Review Timeline

<table>
<thead>
<tr>
<th>Date</th>
<th>Event Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thursday, February 19th</td>
<td>Training/review with Supervisors on how to conduct effective performance reviews. Review process and timeline/deadlines during training.</td>
</tr>
<tr>
<td>Thursday, February 19th</td>
<td>Supervisors receive copies of previous year reviews, disciplinary actions, memo to files, quality write ups and preparation answer question sheet.</td>
</tr>
<tr>
<td>Monday, February 23rd – Friday, February 27th</td>
<td>Supervisors provide associates with a copy of the preparation answer questions and discuss deadline (3/4) for the sheet to be returned to supervisor.</td>
</tr>
<tr>
<td>Wednesday, March 4th</td>
<td>Preparation answer question sheet submitted to Supervisor.</td>
</tr>
<tr>
<td>Friday, March 13th</td>
<td>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.</td>
</tr>
<tr>
<td>Wednesday, March 18th</td>
<td>HR will return reviews with comments to Supervisors.</td>
</tr>
<tr>
<td>Thursday, March 19th – Wednesday, April 1st</td>
<td>All reviews completed with associates and returned to HR with preparation answer questions and original packet provided by HR.</td>
</tr>
</tbody>
</table>
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)

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

<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Force rank Associates if needed.</td>
<td>Review compensation for internal equity based on performance</td>
<td></td>
</tr>
</tbody>
</table>
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:

<table>
<thead>
<tr>
<th>GROUPING</th>
<th>Category</th>
<th>% of Associates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group A</td>
<td>Strongest Contributors</td>
<td>10%</td>
</tr>
<tr>
<td>Group B</td>
<td>B1: Strong Performer</td>
<td>20%</td>
</tr>
<tr>
<td></td>
<td>B2: Meets Expectations</td>
<td>40%</td>
</tr>
<tr>
<td></td>
<td>B3: Needs Improvement</td>
<td>20%</td>
</tr>
<tr>
<td>Group C</td>
<td>Requires Significant Improvement</td>
<td>10%</td>
</tr>
</tbody>
</table>
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**

<table>
<thead>
<tr>
<th>GROUPING</th>
<th>Category</th>
<th>% of Associates</th>
</tr>
</thead>
<tbody>
<tr>
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</tr>
<tr>
<td>Group C</td>
<td>Requires Significant Improvement</td>
<td>10%</td>
</tr>
</tbody>
</table>

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
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?”

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?”

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?”

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?”

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?”
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?”

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?”

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?”

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?”

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 look 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?”
**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?”

**Organizational skills**
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?”

**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?”

**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?”

**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?”

**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?”

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

<table>
<thead>
<tr>
<th>Accuracy</th>
<th>Achievement</th>
<th>Administration</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Develops realistic tolerance levels</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Keeps accurate records</td>
<td>- Focuses on results</td>
<td>- Establishes effective systems for record retention</td>
</tr>
<tr>
<td>- Provides explicit documentations</td>
<td>- Achieves optimal outcomes</td>
<td>- Capably manages records retention program giving proper attention to legal, tax and operational concerns</td>
</tr>
<tr>
<td></td>
<td>- Exceeds the norm</td>
<td>Is highly skilled in electronic records management</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Avoids burdening management with administrative details</td>
</tr>
<tr>
<td><strong>Analytical Skills</strong></td>
<td><strong>Coaching and Counseling</strong></td>
<td><strong>Communication Skills</strong></td>
</tr>
<tr>
<td>- Excels in tedious research</td>
<td>- Is highly respected by employees for sharing concerns, problems and opportunities</td>
<td>- Excels in effective and positive communications</td>
</tr>
<tr>
<td>- Applies sound analytical thinking</td>
<td>- Keeps abreast of new software applications</td>
<td>- Keeps meetings action-oriented</td>
</tr>
<tr>
<td>- Is very methodical in solving problems</td>
<td>- Lends support and guidance to employees</td>
<td>- Asks penetrating questions</td>
</tr>
<tr>
<td></td>
<td>- Gives helpful guidance to employees</td>
<td>- Is an empathetic listener</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Effectively communicates with co-workers</td>
</tr>
<tr>
<td><strong>Competency</strong></td>
<td><strong>Computer Skills</strong></td>
<td><strong>Cooperation</strong></td>
</tr>
<tr>
<td>- Focuses on core competencies</td>
<td>- Keeps alert to new computer hardware</td>
<td>- Is extremely cooperative with associates</td>
</tr>
<tr>
<td>- Demonstrates strong personal effectiveness</td>
<td>- Keeps abreast of new software applications</td>
<td>- Builds cooperation</td>
</tr>
<tr>
<td>- Attends seminars and workshops to improve personal competence</td>
<td>- Makes effective use of on-line resources</td>
<td>- Promotes productive cooperation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Displays a harmonious and cooperative spirit</td>
</tr>
<tr>
<td><strong>Cost Management</strong></td>
<td><strong>Creativity</strong></td>
<td><strong>Decision Making</strong></td>
</tr>
<tr>
<td>- Controls expenses without lowering accomplishments</td>
<td>- Successfully develops creative strategies</td>
<td>- Makes decisions with confidence</td>
</tr>
<tr>
<td>- Displays sound judgment in managing and controlling expenses</td>
<td>- Welcomes ideas from subordinates</td>
<td>- Concentrates on developing solutions</td>
</tr>
<tr>
<td>- Effectively commits resources of staff, founds and time</td>
<td>- Is receptive to new ideas</td>
<td>- Encourages decision making at lowest possible level</td>
</tr>
<tr>
<td></td>
<td>- Is willing to change</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Excees in nurturing new ideas</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Understands “ambiguity and change” and how these critical concepts impact the organization</td>
<td></td>
</tr>
<tr>
<td><strong>Delegating</strong></td>
<td><strong>Dependability</strong></td>
<td><strong>Development</strong></td>
</tr>
<tr>
<td>- Provides subordinates with the resources needed to accomplish results</td>
<td>- Fully accepts all responsibilities and meets deadlines</td>
<td>- Is eager to participate in professional development programs</td>
</tr>
<tr>
<td>- Encourages subordinates to solve their own problems</td>
<td>- Can be relied upon to accomplish the best possible results</td>
<td>- Displays an ability to turn weaknesses into strengths</td>
</tr>
<tr>
<td>- Creates a high degree of trust with subordinates</td>
<td>- Generates greater success in highly complex situations</td>
<td>- Encourages employees to become promotable</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Environmental, Safety and Security</strong></th>
<th><strong>Evaluation Skills</strong></th>
<th><strong>Goals and Objectives</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>- Closely follows all safety regulations</td>
<td>- Accurately assesses potential</td>
<td>- Effectively communicates objectives</td>
</tr>
<tr>
<td>- Excels in accident prevention management</td>
<td>- Rates on the basis of performance and not personality</td>
<td>- Sets compelling personal goals</td>
</tr>
<tr>
<td>- Adheres to all security policies</td>
<td>- Effectively rates job performance</td>
<td>- Keeps employees focused on achieving goals</td>
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</tbody>
</table>
and not the individual
- Carefully limits all evaluations to on-the-job performance
- Understands accomplishments, strengths and weaknesses of employees

<table>
<thead>
<tr>
<th>Improvement</th>
<th>Initiative</th>
<th>Innovation</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Is continuously planning for improvement</td>
<td></td>
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<tr>
<td>- Promotes improvement-oriented ideas</td>
<td></td>
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<tr>
<td>- Uses constructive criticism to improve performance</td>
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<tr>
<td>- Establishes goals for improvement of performance targets</td>
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<tr>
<td>- Displays improved potential for advancement</td>
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<tr>
<td>- Explores new opportunities</td>
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<tr>
<td>- Requires minimum supervision</td>
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<tr>
<td>- Extremely active and eager to try new approaches</td>
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<tr>
<td>- Excels in developing innovative and creative solutions</td>
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<tr>
<td>- Seeks continuous innovation</td>
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</tr>
<tr>
<td>- Excels in innovative thinking</td>
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<table>
<thead>
<tr>
<th>Interpersonal Skills</th>
<th>Judgment</th>
<th>Knowledge</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Excels in effective human relations</td>
<td></td>
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<tr>
<td>- Recognizes the needs of others</td>
<td></td>
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<tr>
<td>- Excels in obtaining enthusiastic commitments</td>
<td></td>
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<tr>
<td>- Develops positive working relationships</td>
<td></td>
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<tr>
<td>- Promotes harmony among associates</td>
<td></td>
<td></td>
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<tr>
<td>- Promotes participative approaches</td>
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<tr>
<td>- Excels in making appropriate judgments</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Can be trusted to use good judgment</td>
<td></td>
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</tr>
<tr>
<td>- Exercises sound judgment on behalf of others</td>
<td></td>
<td></td>
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<tr>
<td>- Clearly understands purposes, objectives, practices and procedures of department</td>
<td></td>
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<tr>
<td>- Demonstrates a strong, functional knowledge</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Keeps well informed on business, political and social issues</td>
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<table>
<thead>
<tr>
<th>Leadership</th>
<th>Learning Ability</th>
<th>Loyalty and Dedication</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Is able to quickly gain the support of others</td>
<td></td>
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<tr>
<td>- Inspires confidence and respect</td>
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<tr>
<td>- Leads with authority and respect</td>
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<tr>
<td>- Shows appreciation for contributions and achievements</td>
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<tr>
<td>- Promotes harmony and teamwork</td>
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<tr>
<td>- Is eager to enhance skill levels</td>
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<tr>
<td>- Benefits from all learning situations</td>
<td></td>
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<tr>
<td>- Is committed to continuous learning</td>
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<td></td>
</tr>
<tr>
<td>- Is continuously learning through educational and professional improvement programs</td>
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<td></td>
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<tr>
<td>- Takes pride in job</td>
<td></td>
<td></td>
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<tr>
<td>- Is highly devoted to achieving objectives</td>
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<td></td>
</tr>
<tr>
<td>- Displays a high degree of honesty, loyalty and integrity</td>
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<table>
<thead>
<tr>
<th>Management Ability</th>
<th>Maturity</th>
<th>Mental Skills</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Effectively uses contemporary management concepts / ideas</td>
<td></td>
<td></td>
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<tr>
<td>- Encourages participative management</td>
<td></td>
<td></td>
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<tr>
<td>- Is a powerful asset to the organization</td>
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<tr>
<td>- Identifies major management problems</td>
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<tr>
<td>- Is a polished and effective executive</td>
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<tr>
<td>- Avoids managing by crisis</td>
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<tr>
<td>- Recognizes the differences between managing and doing</td>
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<tr>
<td>- Effectively manages change</td>
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<tr>
<td>- Copes constructively with emotions</td>
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<tr>
<td>- Avoids overreacting</td>
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<tr>
<td>- Keeps anger under control</td>
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<tr>
<td>- Confronts reality</td>
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<tr>
<td>- Uses common sense to reach workable conclusions</td>
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<td></td>
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<tr>
<td>- Displays imaginative thinking</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Excels in heuristic thinking</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Thinks futuristically</td>
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<table>
<thead>
<tr>
<th>Motivation</th>
<th>Negotiating Skills</th>
<th>Oral Expression</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Displays strong achievement drive</td>
<td></td>
<td></td>
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<tr>
<td>- Is realistically enthusiastic</td>
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<tr>
<td>- Accentuates the positive</td>
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</tr>
<tr>
<td>- Displays energy and vitality in performing daily responsibilities</td>
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<td></td>
</tr>
<tr>
<td>- Views problems as opportunities is results/outcomes oriented</td>
<td></td>
<td></td>
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<tr>
<td>- Excels in negotiating fair resolutions</td>
<td></td>
<td></td>
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<tr>
<td>- Is a key facilitator</td>
<td></td>
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<tr>
<td>- Reconciles differences without creating resentment</td>
<td></td>
<td></td>
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<tr>
<td>- Handles confrontations with tact</td>
<td></td>
<td></td>
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<tr>
<td>- Excels in impromptu speaking situations</td>
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<td></td>
</tr>
<tr>
<td>- Communicates with ease and a natural style</td>
<td></td>
<td></td>
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<tr>
<td>- Speaks with enthusiasm and confidence</td>
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</tr>
<tr>
<td>Organizing</td>
<td>Personal Qualities</td>
<td>Persuasiveness</td>
</tr>
<tr>
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</tr>
<tr>
<td>- Makes the most of organizational energy and potential</td>
<td>- Has a calm, even temperament</td>
<td>- Persuades with tact</td>
</tr>
<tr>
<td>- Demonstrates a systematic approach in carrying out assignments</td>
<td>- Is sincere</td>
<td>- Writes with persuasion</td>
</tr>
<tr>
<td>- Exerts a positive influence on the organizational climate</td>
<td>- Possesses all traits associated with excellence</td>
<td>- Persuades without antagonizing</td>
</tr>
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<table>
<thead>
<tr>
<th>Planning</th>
<th>Potential</th>
<th>Presentation Skills</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Effectively plans work schedules to balance peak and slack periods</td>
<td>- Displays high management potential</td>
<td>- Delivers presentations with enthusiasm and energy</td>
</tr>
<tr>
<td>- Keeps comfortably ahead of work schedule</td>
<td>- Is capable of assuming greater challenges</td>
<td>- Is able to present dry and technical information</td>
</tr>
<tr>
<td>- Excels in developing tactical action plans</td>
<td>- Displays a high energy potential</td>
<td>- Continuously strives to improve presentation skills</td>
</tr>
<tr>
<td>- Is very skilled in turning theory into action plans</td>
<td>- Is enhancing growth potential through additional education and training</td>
<td></td>
</tr>
<tr>
<td>- Plans for the unexpected</td>
<td>- Displays a high energy potential</td>
<td></td>
</tr>
<tr>
<td>- Focuses on the future</td>
<td>- Plans for the unexpected</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Prioritizing</th>
<th>Problem Solving</th>
<th>Productivity</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Excels in eliminating unproductive activities</td>
<td>- Displays a practical approach to solving problems</td>
<td>- Demonstrates consistently distinguished performance</td>
</tr>
<tr>
<td>- Recognizes the need to concentrate on people rather than tasks</td>
<td>- Effectively solves problems rather than symptoms</td>
<td>- Is an abundant producer</td>
</tr>
<tr>
<td>- Is able to distinguish between crucial and trivial</td>
<td>- Works well with others in solving problems</td>
<td>- Sustains a high achievement level</td>
</tr>
<tr>
<td>- Sees the big picture</td>
<td>- Displays a practical approach to solving problems</td>
<td></td>
</tr>
<tr>
<td>- Places organizational needs ahead of personal convenience</td>
<td>- Effectively solves problems rather than symptoms</td>
<td></td>
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<table>
<thead>
<tr>
<th>Professionalism</th>
<th>Project Management</th>
<th>Quality</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Continuously seeks to broaden professional horizons</td>
<td>- Clearly establishes project goals and objectives</td>
<td>- Is fully committed to quality assurance</td>
</tr>
<tr>
<td>- Develops the skills needed to maintain the highest standards of professional excellence</td>
<td>- Keeps management fully informed of a project’s progress</td>
<td>- Excels in detecting flaws or imperfections</td>
</tr>
<tr>
<td>- Develops enduring professional relationships</td>
<td>- Is able to keep programs and projects running smoothly</td>
<td>- Strives for state-of-the-art perfection</td>
</tr>
<tr>
<td>- Projects poise and authority</td>
<td>- Effectively matches goals to resources</td>
<td></td>
</tr>
<tr>
<td>- Writing reflects a polished professional appearance</td>
<td>- Effectively assesses employee resources, strengths and competences</td>
<td></td>
</tr>
</tbody>
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<table>
<thead>
<tr>
<th>Resourcefulness</th>
<th>Responsibility</th>
<th>Stress</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Effectively matches goals to resources</td>
<td>- Accepts full responsibility for results</td>
<td>- Successfully handles multiple demands from superiors and subordinates</td>
</tr>
<tr>
<td>- Effectively assesses employee resources, strengths and competences</td>
<td>- Continues full responsibility for results</td>
<td>- Copes effectively with pressures and tensions</td>
</tr>
<tr>
<td>- Makes optimum use of department resources</td>
<td>- Seizes responsibility without causing seizures in either subordinates or himself/herself</td>
<td>- Maintains coolness despite annoyances</td>
</tr>
<tr>
<td>- Effectively uses all information sources</td>
<td>- Eagerly seeks formidable challenges</td>
<td>- Works effectively in high pressure situations</td>
</tr>
</tbody>
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| Supervisory Skills | Tact and Diplomacy | Team Skills |
- 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

- Handles sensitive situations with 
confidence 
- Is very tactful when facing 
confrontation 
- Displays trust and mutual 
understanding 
- Conveys sincere appreciation at 
every opportunity

- 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

<table>
<thead>
<tr>
<th>Technical Skills</th>
<th>Time Management</th>
<th>Versatility</th>
</tr>
</thead>
</table>
| - Builds a strong sense of technical teamwork and purpose 
  - Effectively blends management skills with technical expertise 
  - Keeps informed of new technologies in office automation | - Avoids becoming involved in endless details 
  - Makes effective use of supervisors’ time and resources 
  - Works smarter, not harder 
  - Doesn’t “major in the minors” | - 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 |

<table>
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<th>Vision</th>
<th>Writing Ability</th>
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| - Develops vision statements that reflect realistic solutions 
  - Displays visionary leadership skills 
  - Displays long-range/long-term vision 
  - Develops strategic vision 
  - Excels in visionary strategies | - Writes in a positive manner to reflect favorably upon the organization 
  - Possesses a large vocabulary 
  - Is highly skilled in preparing reports and proposals |