YYYY Organization Performance Evaluation System

|  |
| --- |
| About This Resource At least once a year, managers and staff members should meet one-on-one to reflect on the manager/staff relationship, realign on expectations, and discuss overall performance. **This template is intended for use by both managers to assess staff and staff members to self-evaluate and share feedback with their manager.**   * Page 1 offers background for managers. * Pages 2-5 can be shared with both staff members and managers.   To get the most use out of this tool, you should add or remove sections as you see fit. Insert all of the goals, team or organizational values, and core competencies that you have set expectations for. You may also outline the timeline for your process (including key deadlines) below. |

Managers: Before you get started, review our [Eight-Step Guide to Performance Evaluations for Managers](https://www.managementcenter.org/article/eight-step-guide-to-performance-evaluations-for-managers/) and [FAQs About Performance Evaluations](https://www.managementcenter.org/article/frequently-asked-questions-answers-performance-evaluations/). A few other things to keep in mind:

* **Preparation:** During the evaluation process, both the manager and the staff member take time to reflect before meeting for a discussion. Managers may review staff work products, role expectations, and the results they achieved toward annual objectives. The manager should ensure these goals and expected results are clear at the start of the year and aligned with organizational goals.
* **Summarize, without surprise:** These formal conversations should reflect and build on the feedback you provided at regular check-ins throughout the year. The performance review is not the time for surprises.
* **Broaden your perspective**: Ask a few people for input. [Seeking input](https://www.managementcenter.org/article/how-to-gather-and-use-input-from-others-in-performance-evaluations/) from fellow team members, colleagues in other departments, and community members or partners can bring rigor, help [offset manager bias](https://www.managementcenter.org/article/four-ways-to-mitigate-bias-in-performance-evaluations/), and help managers identify patterns or inconsistencies, especially across lines of difference or power.

Reference our samples: [Corrective Performance Evaluation](http://www.managementcenter.org/resources/completed-performance-evaluation-corrective-assessment/) and [Strong Performance Evaluation](http://www.managementcenter.org/resources/completed-performance-evaluation-strong-assessment/).

# Performance Evaluation Overview – for use by staff and manager

Our performance evaluation system consists of four main sections:

1. **What was achieved?**   
   What progress did the staff member make toward key goals for the year? The first section of the review focuses on the extent to which the staff member clearly met expectations. (In cases where unforeseen opportunities or challenges arose during the year, they should be added here.)
2. **How was it achieved?**How well did the staff member demonstrate competencies essential to the position? This section focuses on the values that all employees are expected to demonstrate, and the specific approaches necessary for effective performance in the role.
3. **What’s next?**How did the staff member do overall and what does the path forward look like? This section summarizes performance for the year and identifies overall areas of strength, areas for improvement, and next steps. Include learning or developmental goals from the coming period, and any support they will receive on this path.
4. **Feedback for manager and manager self-reflection**What did the manager do well to support staff success? What is needed? This section gives both the staff member and the manager space to reflect on what’s working and what support is needed moving forward.

# 

## Ratings

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

|  |  |  |
| --- | --- | --- |
| **Timeline** | | |
| **Activity** | **Date** | **Notes** |
| Staff member completes self-evaluation, using form below |  |  |
| Manager gathers input, reviews goals and results achieved, and drafts evaluation |  |  |
| Manager sends draft evaluation to staff member |  |  |
| Manager and staff meet to discuss evaluation |  |  |
| Revisions/additions made (if needed), next steps confirmed, and evaluation complete |  |  |

# Performance Evaluation Form

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

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

|  |  |  |
| --- | --- | --- |
| **2. Demonstrating Competencies** | | |
| **Core Values**  *Add more rows as needed* | **Description of Value** | **Rating**  **(E, M, P, D, N/A)** |
|  |  |  |
|  |  |  |
|  |  |  |

|  |  |  |
| --- | --- | --- |
| **Core Competencies**  *Add more rows as needed* | **Description of Competency** | **Rating**  **(E, M, P, D, N/A)** |
|  |  |  |
|  |  |  |

|  |
| --- |
| **Staff Comments:** *To what degree did you demonstrate the above core values and competencies? In what values and competencies did you excel? In what areas is improvement needed?* |
| **Manager Comments:** *To what degree did the staff member demonstrate the above core values and competencies? In what values and competencies did they excel? In what areas is improvement needed?* |

|  |
| --- |
| **3. Summary Assessment, Next Steps, and Trajectory at Organization** |
| **Overall performance rating:**  **⬚** Exceeds Expectations **⬚** Meets Expectations  **⬚** Partially Meets Expectations **⬚** Does Not Meet Expectations |
| **Staff Member self-assessment of performance:**  1. What are 1-3 notable areas of strength?  2. What are 1-3 areas of growth or improvement?  3. What do you see as your trajectory in the organization? What are the next steps? |
| **Manager assessment of staff performance:[[2]](#footnote-2)**  1. What are 1-3 notable areas of strength?  2. What are 1-3 areas of growth or improvement?  3. What do you see as the staff member’s trajectory in the organization? What are the next steps? |

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

1. If the manager and staff member didn’t set formal goals for the year, fill in each of the staff member’s key areas of work and assess to what extent their accomplishments represent significant progress in that area. [↑](#footnote-ref-1)
2. If the manager solicited input from others, use this section to summarize themes and highlights in addition to your own assessment. [↑](#footnote-ref-2)