Sample Performance Evaluation Form:

Corrective Assessment

# Ratings

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

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

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| **Employee Name, Position** | Eric Bardwell, Technology Director |
| **Manager Name, Position** | Julia Torres, Managing Director |
| **Review Period** | January – December 20XX | **Review Date** | December 5, 20XX |
| **Reviewed by** | **⬚** Self ☑Manager  |

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| **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*** |
| Achieve high level of internal customer satisfaction, with 75% of participants “highly satisfied” on year-end survey and no gaps in race or gender. | 62% highly satisfied, no gaps in race or gender | D |
| Complete website build-out/redesign on-time and bug-free by July 1 | Site launched three weeks late and there were four bugs reported during the first month | **P/D** |
| Complete online application system on time and bug-free with full functionality by October 1 | Launched on October 3, three bugs reported and fixed in first week | P |
| **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?* Use a clear initial sentence to present the overall picture, then focus on specifics within that context.While you had some accomplishments this year, overall, you fell short of our aims. Positive highlights include completing a number of the priority items we identified through the quarterly plans: getting the online application system up and missing an aggressive deadline by just two days, and meeting a large number of recruitment and admissions needs.However, in several other key areas, the results were not what we wanted. Internal satisfaction is the most notable one. You’ll need to improve those numbers by building tech capabilities for the regions more quickly and tackling remote access more aggressively. The website result was also mixed. It was an aggressive goal, but it might have been reachable if you’d prioritized hiring JS earlier in the year.Be honest and straightforward with critical feedback. |

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| **2. Demonstrating Competencies** |

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| **Core Values** | **Description of Value** | **Rating****(E, M, P, D, N/A)** |
| Tenacity in Pursuit of Results | We are determined to achieve ambitious, measurable results in working toward our vision. As a result, we continue pursuing our end goals despite the constraints or obstacles we encounter along the way. | M |
| Critical Thinking | We think critically about all we do, approaching each issue and decision with rigor and seeking ways to expand our perspectives. | M |
| Collective Impact & Personal Ownership | We assume responsibility for the success of our broader movement and contribute toward increasing our collective impact. We each assume ownership for producing the best possible result in our area of work. | P |
| Continuous Learning | We reflect on and draw lessons from previous experiences with attention to seek feedback, especially across lines of difference and power. We apply lessons so we can do even better in future endeavors.  | D |
| Respect, Self-Awareness, and Relationship-Building | We approach others in a way that demonstrates that we value them and their contributions. We understand how our identities, experiences, and backgrounds influence how we show up in the world and in our work. We find (and create) opportunities to deepen connections and build authentic, mutual relationships across lines of difference. | M |
| Racial equity and inclusion (REI)  | We work to acknowledge and address the impacts of systems of oppression on our work and our people. We appreciate that diversity makes us better at what we do, we identify potential for bias and actively work to minimize inequities and create an environment in which everyone on the margins can thrive. | M |

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| **Core Competencies** | **Description of Competency** | **Rating****(E, M, P, D, N/A)** |
| Problem-solving and resourcefulness | Adapts to evolving needs of the organization, identifies issues, and plans ahead to accomplish goals. Leverages resources creatively to solve problems, analyzes data, and generates wise, actionable recommendations. | E |
| Communication and collaboration | Gathers input and negotiates details of complex projects involving multiple actors. Consistently provides clear, helpful information, including written documents, and builds rapport necessary to advance goals. | M |
| Highly organized, responsive, and detail-oriented | Holds a high bar even when things are hectic and maintains a system to prioritize tasks effectively, accomplish tasks efficiently, and follow through on all commitments. | M |
| Inclusive leadership and management | Approaches leadership with a mindset of “power with” rather than “power over.” Builds a high-performing team and appropriately structures jobs so staff members can succeed. | E |
| External relations | Serves as an effective ambassador, builds connections, and maintains relationships with outside vendors. | M |
| Staying current on latest technology | Stays up-to-date on latest technological developments and how companies can use them to improve performance, and draws on this base of knowledge to address organizational challenges.  | P |

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| **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?*As with the results you got this year, there are some positives here but also some important areas for improvement. I want to start by recognizing your improvement on “respect, self-awareness, and relationship-building.” I know you’ve been more conscious of how you approach others—including showing people that you respect what they bring to the table, and making sure that you address problems head-on instead of leaving them to simmer, and I think your efforts have paid off.Of all our core values, the area where I think you have the most potential for improvement is “collective impact and personal ownership”—specifically the ownership part. I’ve seen you be good at this, like last year when you got the servers up and running quickly. But there are other situations, such as the website, where you seem content to have circumstances determine project outcomes. I want to see you take full responsibility for making your projects a success. This means when people are vague about what they want, you ask lots of questions, show them examples of other systems, and insist on figuring out what they will and won’t like so the end product works well. Then, you need to plan backwards in order to break down steps and bring it in by the deadline. In that plan, you should build in enough of a cushion so you have time to deal with inevitable hurdles, rather than allowing circumstance to determine whether you succeed or not. If you do that, I think you can fully meet my expectations in this area and for your role, which is making our technology work at an exemplary level. Be as specific as possible about what success looks like.Where relevant, cite specific examples.On skills, one area to highlight is organization. I’m still not 100% confident you’ll follow through when you tell me you’ll do something. One recent example: we had agreed you would send me your evaluation of ST before you conducted the meeting so we could touch base about the overall message, and that did not happen. This is a key area to improve on quickly. |

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| **3. Summary Assessment, Next Steps, and Trajectory at Organization** |
| **Overall performance rating:****⬚** Exceeds Expectations **⬚** Meets Expectations☑ Partially Meets Expectations **⬚** Does Not Meet Expectations |
| **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?*** 1. You have built a technology infrastructure that works well overall and helps people do their jobs much more effectively than they were able to before. I’ve also been impressed by how you’ve been able to help our team members get familiarized with the changes to our system and understand why we needed to change things.
	2. You have also instilled a strong ethic in your team of responding to “client” needs and have worked on communicating more effectively with others in the organization.

Put the headline assessment up front and, again, be straightforward and honest. Be specific about next steps where appropriate.**2. What are 1-3 areas of growth or improvement?*** 1. As I said initially, your performance this year was mixed and we need it to continue to improve. What I’d like you to focus on as you move forward is the “collective impact and personal ownership” piece I mentioned in the previous section. Probably the best place to start is with the online regional reporting system. At our next check-in we can go over what taking responsibility for that process would look like, and ensure you have clarity and support. You have the skill so it really will come down to taking ownership for making it happen. I believe that you can do it.

**3. What do you see as the staff member’s trajectory in the organization? What are the next steps?*** 1. If I see improvement in the areas listed above, I could see you staying in this role and taking our technology team to new heights. I look forward to discussing this more with you at our evaluation meeting.
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| **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?
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| **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?

I think I did a better job this year of being more hands-off and giving you the space to solve problems on your own. You were able to arrive at solutions that I wouldn’t have thought of, and you really took leadership of your team.That said, I could have been more proactive in spotting and coaching when issues came up. While we checked in regularly and I offered (and sought your) feedback, I didn’t make enough time to address issues as they arose. With coaching in place, you would have had more opportunities to change course and improve. This is something I commit to improving on moving forward. I will calendar our quarterly stepbacks to make dedicated time to elicit and debrief quarterly staff polls leading up to the year-end survey, and I will identify a project to model effective backwards planning before you tackle the regional reporting system. I welcome your ideas and support requests, too. |

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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)