Sample Performance Evaluation Form:

Strong 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** | Jesse Seacrest, Development Director |
| **Manager Name, Position** | Julia Torres, Managing Director |
| **Review Period** | January – December 20XX | **Review Date** | December 8, 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*** |
| **Raise operating funding to $12.5 million** | **$12.8 million** | **E** |
| **Secure $2 million federal funding for following FY (2009)** | **$1.8 million** | **M** |
| Increase number of individual donors giving at least $5K to 150, with 40% of individual donors identifying as people of color | 170 | E |
| **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?* I think your results were spectacular. Even in a year when the economy was only so-so, we’re on track to exceed our funding goal by roughly $300K. You really drove this by focusing on key areas within regions, maximizing contributions from numerous national funders, and turning things around from the previous year in terms of ongoing funding at the federal level. Going forward, in addition to keeping up the great work and doing what you’re doing, the main area I think you should focus on more is being out in the regions (physically and virtually), proactively engaging with and serving as a resource to RDs. (To be clear, the RDs all report that you’re incredibly helpful, but in several cases it’s also clear that deeper engagement would be valuable, especially for newer folks who are still learning.) Identifying the key levers that can take things to a higher level in particular regions will be valuable, particularly as our growth rate slows in more well-developed regions.Even in a strong evaluation, identify the path for the person to get to the next level. |

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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. | E |
| 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. | E |
| 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.  | M |
| 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 | Identifies issues, effectively structures problems, analyzes data to produce insights, 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 partners, funders, donors, and stakeholders. | M |

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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 your exemplary ratings indicate, you embody our core values. A couple of particularly noteworthy areas: Be detailed even in a strong review—it’s a great opportunity to let a high performer know they are valued, which will be a big factor in retention.* Tenacity in Pursuit of Results—You continued pursuing every last channel, turned around applications for funds at the last minute, etc.
* Collective Impact and Personal Ownership—HG said it well in her recent email to you on this: you push us to pursue the additional channels “even though you knew it would create an added burden for the development team and despite the fact that it had nothing to do with your overall funding goal.”

You’re also operating at an exceptionally high level when it comes to skills:* Problem solving and resourcefulness—It’s hard to overstate your strengths as a thinker. On so many occasions over the past year, you’ve exercised great judgment about which levers we should pursue and how we should pursue them. One great example is the last funding memo you wrote, which does a great job of recognizing what our opportunities and constraints may be.
* Organization, responsiveness, and attention to detail—I’d be interested to hear whether you think this has improved. My sense is that you have gotten better in terms of prioritizing work and this area may come down to hiring the right people for your team. The fact that things like end-of-year giving are rolling forward speaks well of your ability to take big projects and break them down. At the same time, you might think about whether there are any systems you could put in place to guarantee that a big project (like the fund initiative) meets its deadline and stays on track, perhaps by setting up additional “padding” around deadlines.
* Inclusive leadership and management—You did an outstanding job managing the make-up of your team, notably around transitioning out SH, bringing on LF and HW, and retaining MK. Your team feels that you’re an incredibly helpful, accessible resource. One possible area of improvement is in giving more regular feedback. One person wrote that “it would be helpful if he could provide more feedback, good and bad, on a regular basis.”
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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 are great at getting spectacular results while building strong relationships with the people you manage and partner with. This is no small feat when you’re managing a diverse team with ambitious goals and tight deadlines. I could tell from my conversations with your direct reports that they see you not just as a manager, but as a leader who inspires them.
	2. Your ability to break down big projects into small pieces and then delegate them effectively means that you’ve been able to exceed expectations in key areas, including our dollars raised.

**2. What are 1-3 areas of growth or improvement?*** 1. As I mentioned in the goals section: engaging with RDs to identify key levers. This will be essential for us to continue meeting our considerable funding needs. This is something that’s already going pretty well and that, if improved, could take our work to new heights.
	2. Another thing noted above: giving more regular feedback to your direct reports. Since your team is meeting expectations, I suggest focusing on developmental feedback to help your team get next-level results.

**3. What do you see as the staff member’s trajectory in the organization? What are the next steps?**Be detailed even in a strong review—it’s a great opportunity to let a high performer know they are valued, which will be a big factor in retention.* 1. Will you commit to another 5 years? ☺ Seriously, I know we’ll be having lots of discussions re: your future plans as part of our long-term plan, and I’m assuming we’ll talk about this then.
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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 was able to serve as a thought partner when you were dealing with tricky decisions, and I hope I was able to balance that with giving you the autonomy to make decisions and lead your team. I know there were times this year when I wasn’t as available as I could have been, which resulted in you having to chase me down for answers or risk making decisions without my input. I can’t avoid the busy seasons in my work, but I want to be more mindful about communicating with you when I know I’ll be less available, so that we can plan around those times.  |

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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)