**Employee Self-Performance Appraisal** 

Due first week of June and December along with SMART Goals and Goal Result Forms.

**Employee Name:**       **Date:**

Performance period being evaluated:

Year:       [ ]  6 months ended June [ ]  6 months ended December

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| PERFORMANCE | **SELF RATING****1-5\*** | **RATING WITH SUPERVISOR\*\*** | **COMMENTS (OPTIONAL)** |
| **1. CLIENT RELATIONS/INTERACTION**Attention and concern for client satisfaction |       |       |  |
| **2. JOB KNOWLEDGE**Practical/technical skills & information used on the job. |       |       |  |
| **3. QUALITY**Accuracy, thoroughness & acceptability of work. |       |       |  |
| **4. PRODUCTIVITY**Volume & timeliness of work done in a specific time period |       |       |  |
| **5. TEAMWORK**Willingness and demonstrated ability to cooperate work & communicate with co-workers, other staff, and outside contacts. Ability to accept constructive criticism. |       |       |  |
| **6. INITIATIVE**Employee seeks additional work; acts independently in new/routine situations. |       |       |  |
| **7. RELIABILITY**Follows through on assignments and instructions by established deadline. Follows firm rules. |       |       |  |
| **8. RESOURCEFULNESS**Uses all available resources in pursuit of job objectives. |       |       |  |
| **9. ADAPTABILITY/FLEXIBILITY**Approach and attitude toward new challenges, responsibilities and change. |       |       |  |
| **10. CREATIVITY/ INNOVATION**Ability to evaluate ideas and problem solve in an imaginative, functional and beneficial way.  |       |       |  |
| **11. JUDGMENT**Reasoning ability and decision-making skills |       |       |  |
| **12. ATTENDANCE & PUNCTUALITY**Adheres to firm policy; reliable and regular attendance, punctual arrival and departure. |       |       |  |
| **TOTALS** |       |       |  |
| **OVERALL RATING** **(Total divided by 12, rounded to 2 decimals)** |       |       |  |

*\* Ratings: 1=Acceptable, 2=Need to Improve, 3=Acceptable, 4=Very Good, 5=Exceptional*

*\*\* Employee will meet with supervisor and during the meeting will determine final ratings in a combined effort*

| **PERFORMANCE** | **1. NOT ACCEPTABLE** | **2. NEED TO IMPROVE** | **3. ACCEPTABLE** | **4. VERY GOOD** | **5. EXCEPTIONAL** |
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| 1. CLIENT RELATIONS/ INTERACTION | Often not pleasant, offers no assistance in trying to solve problem. (Does not ask questions). Critical voice tone & attitude. Does not Listen to client need. Rushes client. | Not consistently pleasant. Offers min. assistance. Does not adequately answer client questions, projects disinterested attitude. | Maintains a pleasant demeanor; helps client adequately. Answers client questions. Offers reasonable assistance. | Greets client in a friendly manner; asks questions to determine needs. Listens carefully. Answers questions correctly. Guides client and offers solutions. | Cheerfully welcomes all clients, projects very interested & helpful attitude. Lets client know their business is appreciated. Ensures correct answers to all questions. |
| 2. JOB KNOWLEDGE | After training, exhibits complete lack of knowledge to perform work properly. No desire for training. Training unlikely to help. | Displays insufficient knowledge of current position & related jobs. Additional training necessary. Displays lack of training retention. Reluctant to learn. | Demonstrates satisfactory knowledge of current position and sufficient knowledge of related jobs. Demonstrates ability to learn. | Consistently well informed about present job and related jobs. Keeps up on new/changes in procedures. Occasionally seeks to learn new skills. | An authority on own tasks and excellent knowledge of related jobs. Conducts and/or assists in training. Always learning and applying new skills. |
| 3. QUALITY | Quality poor, not acceptable. Excessive errors. Unable to interpret forms/support. Consistently lacks necessary documentation/ support. | Quality mostly acceptable. Occasional errors. Documentation/ support sometimes insufficient and/or incorrect. | Quality acceptable. Any errors have been infrequent and tolerable. Usually has adequate documentation/ support. | Often perfect work. Consistent quality with few errors. Consistently has necessary and correct documentation/ support | Consistently highest possible quality. Final product virtually perfect. Consistently has necessary and correct documentation/ support. |
| 4. PRODUCTIVITY | Fails to accomplish the most basic job tasks. Consistently turns in work far beyond established deadlines. No ability to prioritize. | Accomplishes some tasks in timely manner. Needs deadline reminders. Can prioritize if only a few tasks. Routine supervisory feedback on priorities is required. | Accomplishes most tasks in timely manner. Not always in a hurry to begin the next task. May have to be prompted to start next task. Needs occasional supervisory feedback on priorities.  | Frequently completes tasks ahead of deadline. Occasionally will start new task right away. May take a breather. Usually sets priorities appropriately.  | Always ahead of deadline. Begins new or additional tasks immediately and independently. Considered to be a “top” producer. Always sets appropriate priorities. |
| 5. TEAMWORK/ INTERPERSONAL SKILLS/ COMMUNICATION | Creates hostile environment when interacting with others or a team effort is necessary to complete an assigned task. Projects negative attitude when approached to assist team. Reacts argumentatively to constructive criticism. Communications tend to be hostile, provoking and disruptive to others/team. Refuses to help outside of current job. | Occasionally causes conflict with others in the implementation of an assignment/team project. Projects a cynical/disinterested attitude towards others/ team. Accepts constructive criticism with negative attitude. Often negative towards the firm. Communications are usually negative, unhelpful, or untimely. Does not like to take on jobs outside of present position. | Acceptable relations with others. May have some difficulty communicating intricate or technical information. Generally interacts well with others/ team members. Displays willingness to help out. Accepts constructive criticism. Good attitude towards firm. Generally good communicator, positive and timely. Will pleasantly help with other jobs out of present position when asked. | Usually works well with others/team. Usually demonstrates awareness and consideration of others views. Willing to help out and depart from own job to do so. Accepts constructive criticism and asks for assistance in weak areas. Good team player model. Very good communication skills, positive, timely and thorough. Shows good attitude & pride in firm. | Always works effectively with others. Excellent interpersonal skills. Consistently uses appropriate words in any situation. Displays keen insight about people; readily adapts to their needs. Projects excitement at being part of the team. Seeks criticism as a learning tool & may implement recommendations. Shows pride/good attitude towards firm and builds that within others. Excellent communicator, others can learn from example. Always willing to depart from own job to help. |
| 6. INITIATIVE | Must be told virtually everything. Takes no personal initiative. Projects negative attitude. Never seeks additional tasks. Requires very close supervision. | Requires frequent instruction and close supervision. Projects unwilling attitude. Rarely seeks out additional tasks. | Occasionally seeks specific additional tasks. Willing to handle long term projects. Requires routine supervision. Demonstrates some self-motivation. | Frequently seeks additional tasks. Willing to do extra work to help get the job done. Occasionally misjudges own workload. Occasional supervision necessary. Usually self-motivated. | Consistently willing to accept additional tasks to help get the job done. Never sacrifices assigned job productivity or quality. Seeks every opportunity for self- improvement. Extremely self-motivated. Minimal or no supervision necessary. |
| 7. RELIABILITY | Very often unreliable. Gives up easily. Avoids responsibility. Often does not follow directions. Cannot be trusted to get the job done. Actions do not display dedication to the firm. | Sometimes unreliable. Does not assume responsibility. Seems satisfied to get by. Follows directions but requires constant monitoring. Seeks supervision routine decisions. Cannot be trusted to get the job done. Actions occasionally display dedication to the firm. | Usually reliable. Follows most directions. Does not make many independent decisions. Will risk decision making within own realm of responsibility. Can be trusted to get the job done. Average dedication to the firm. | Consistently reliable. Persistent in spite of most difficulties. Can be relied on to make appropriate decisions, and seeks support only if all other resources are exhausted. Follows directions well. Always gets the job done. Displays dedication to firm most of the time. | Completely reliable. Goes beyond limits of tasks with little or no supervision. Makes independent decision. Ability to improvise on directions to everyone’s benefit. Always gets the job done and more. Displays dedication in any & all circumstances. |
| 8. RESOURCEFULNESS | Shows no concern in going extra step to solve problems. Seems content to turn in incomplete work. Consistently fails to utilize basic resources. Appears unconcerned about need to improve. | Will use resources in routine circumstances. Hesitant to go look for the answers. Knows where to look but tends to be lazy. | Utilizes available resources in most circumstances. Shows concern for going the extra step. | Utilizes all available resources when need occurs. Explores all options and usually chooses correctly. | Utilizes all available resources and will look further if necessary. Explores all options and consistently chooses correctly. |
| 9. ADAPTABILITY/ FLEXIBILITY | Very inflexible and does not accept new challenges. Does not adapt to new procedures of policies. Unwilling to accept different ways to perform tasks. | Can be inflexible and has difficulty accepting changes in procedures, policies, and ways to perform work. Resists new challenges. | Flexible in dealing with different ways of performing work and meeting new challenges. Accepts new policies, procedures and work methods without reservation. | Embraces changes in procedures, policies and methods. Is very flexible in meeting new challenges. Very adaptable and can apply different work methods when necessary. | Enthusiastically and eagerly accepts challenges. Strongly supports and advocates change in policies, procedures and methods of accomplishing work. Is extremely flexible. |
| 10. CREATIVITY/ INNOVATION | Never offers a new idea or creative solution to a problem | Rarely offers a new idea or creative solution to a problem. | Occasionally contributes useful ideas to improve work or solve a problem. | Frequently contributes creative ideas and solutions. | Always looks for creative and innovative ways to improve work and contributes creative ideas and solutions. |
| 11. JUDGMENT | Frequently unable to make decisions or decisions are inappropriate or ineffective. Lacks sound reasoning ability. | Occasionally makes inappropriate or ineffective decisions that result in marginal outcomes. | Exercises sound judgment. Decisions usually correct. Reasoning process generally is sound in a structured environment. | Gathers complete information prior to judgment. Decisions made are the best under the circumstances. | Superior problem-solving capability. Can be counted on to make correct decisions under pressure and without supervision. |
| 12. ATTENDANCE & PUNCTUALITY | Frequently absent. Frequently late. Blatant disregard for attendance and punctuality. | Frequently late. Does not adhere to scheduled shift. | Occasionally late, always makes up time. Work does not suffer. | Near perfect punctuality. Work does not suffer. | Perfect attendance and punctuality. Any time off work is approved in advance. |