

# Sample Employee Performance Appraisal

## The Family Advisor: Management Issues for Family Foundations

### Employees

1. How accurate, thorough, clear is your work (include writing, phone work, etc.)?  
 Excellent    Good    Improvement desired  
Comments:
2. Do you go beyond what's expected when appropriate?  
 Excellent    Good    Improvement desired  
Comments:
3. What is your attendance record? Do you arrive and start on time? Do you attend meetings and appointments as scheduled?  
 Excellent    Good    Improvement desired  
Comments:
4. How well do you work as a member of a team (share information, cooperate, treat everyone equally, etc.)?  
 Excellent    Good    Improvement desired  
Comments:
5. Do you solve your "people problems" directly, quickly and completely?  
 Excellent    Good    Improvement desired  
Comments:
6. Are you ethical when conducting company business?  
 Excellent    Good    Improvement desired  
Comments:
7. Do you consistently anticipate problems, solving them before they become serious? Do you gather facts and provide alternatives without being asked?  
 Excellent    Good    Improvement desired  
Comments:

**Managers**

8. How well have you met your budget objectives?  Excellent  Good  Improvement desired

Comments:

9. How well do you come across when communicating one-on-one or in a meeting?  Excellent  Good  Improvement desired

Comments:

10. Do you delegate assignments with clarity?  Excellent  Good  Improvement desired

Comments:

11. Are you an effective teacher?  Excellent  Good  Improvement desired

Comments:

12. Do you contribute to the professional growth on your co-workers?  Excellent  Good  Improvement desired

Comments:

Additional comments:

Supervisor Comments:

Supervisor's Signature \_\_\_\_\_ Date \_\_\_\_\_

Employee's Comments:

Employee's Signature\* \_\_\_\_\_ Date \_\_\_\_\_

\*NOTE: Employee's signature does not necessarily indicate concurrence with supervisor comments, only that they have been discussed with you.

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## **PERFORMANCE APPRAISAL**

NAME:

POSITION:

PERIOD COVERED:

REVIEWER:

DATE:

Please comment briefly regarding the employee's knowledge of the points on the following pages. Consider both the past as well as suggestions for the future.

### **PROFESSIONALISM**

*Knowledge of the Foundation's policies.*

*Demonstrates commitment to the Foundation's mission and program goals.*

*Maintains accurate and current knowledge about trends, movements, programs, and developing policy in their field of expertise.*

*Adjusts well to new situations; and relates well to community leaders; political leaders; the media; and the general public.*

*Works harmoniously with Board Committee members, the director, peers, and support personnel.*

*Develops and maintains a network of contacts with individuals and group & who are generating ideas relevant to the Foundation's work.*

*Maintains confidentiality of individuals and organizations.*

*Demonstrates prudent use and care of the Foundation's financial and physical resources.*

*Shows a concern for the applicants/grantees.*

*Collaborates effectively in joint projects.*

COMMENTS:

## **ABILITY:**

### Productivity and Quality of Work

*Consistently completing tasks on schedule with a high degree of excellence; utilizing resources and working efficiently; producing effective results; able to analyze issues, data, literature, and proposals well; uses logic and intelligence mixed with concern and care for clients of the grantee.*

### Communications (written and oral)

*Getting ideas across in a clear, persuasive manner; speaking in a pleasant, nonabrasive way; demonstrating diplomacy; interviewing effectively; speaking publicly.*

### Teamwork

*Working cooperatively with others; coordinating activities; communicating progress, problems, opportunities, and accomplishments; assuming joint responsibility.*

### Initiative and Ingenuity

*Willingness to define and take on new opportunities; approaching problems and assignments creatively; enthusiastic.*

### Planning and Programming (relevant to position)

*Forecasting; establishing priorities; managing time; analyzing needs; reviewing solutions; establishing strategies; setting objectives; outlining procedures; gathering facts; developing performance standards; providing for assessment and evaluation.*

### Leadership and Management

*Identifying issues needing attention; organizing and delegating work, providing overall guidance for an assignment and taking appropriate action to correct any problems to move plans forward providing and accepting relevant feed back, encouraging the exchange of ideas; recognizing and encouraging the development of the skill of others.*

### Judgment and Responsibility

*Evaluating and selecting among alternative courses of action; evaluating consequences of a*

*course of action and accepting responsibility for action taken; keeping the director appropriately informed*

## **SPECIFIC SKILLS**

*What do you believe have been the employee's outstanding contributions to his/her job in the past year?*

*What were, if any, the major obstacles? What factors contributed to his/her successes and what factors contributed to those areas where problems arose or expectations were not met?*

*What factors were due to the employee and which were beyond his/her control?*

*What does the employee say are the performance expectations of his/her job, and how should these be measured?*

*What does the employee believe are the critical areas or challenges for the coming year?*

*What are the employee's job objectives for the coming year?*

*What will be needed in terms of training, development, or additional help to accomplish his/her job objectives during the coming year?*

## **SUMMARY:**