

90 DAY PERFORMANCE APPRAISAL

Administrative/Professional/Exempt

Name: _____ Position: _____

Department: _____ Supervisor: _____

Hire Date: _____ Time in Position: _____ years _____ months

Date This Appraisal: _____ Date Last Appraisal: _____ Appraisal Period: _____

APPRAISAL FACTORS

(Check one rating in each category)

Optional: It may be helpful to establish a value for each appraisal factor below. The total of all values must be 100%. The values should be discussed with the employee at the start of the appraisal period.

- O Outstanding
- E Exceptional
- ME Meets or Exceeds Expectations
- B Below Expectations
- M Marginal
- U Unacceptable

<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;"></td> <td style="width: 15%; text-align: center;">Factor Value</td> <td style="width: 10%; text-align: center;">%</td> </tr> </table> <p>1. PRIMARY RESPONSIBILITIES Consider degree to which position description responsibilities are accomplished.</p>		Factor Value	%	O 0 E 0 ME 0 B 0 M 0 U 0	Provide detailed comments an examples
	Factor Value	%			
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;"></td> <td style="width: 15%; text-align: center;">Factor Value</td> <td style="width: 10%; text-align: center;">%</td> </tr> </table> <p>2. PLANNING/THINKING Consider effectiveness in analyzing situations, proposing solutions, developing goals and standards, establishing procedures, forecasting and budgeting.</p>		Factor Value	%	O 0 E 0 ME 0 B 0 M 0 U 0	Provide detailed comments an examples
	Factor Value	%			
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;"></td> <td style="width: 15%; text-align: center;">Factor Value</td> <td style="width: 10%; text-align: center;">%</td> </tr> </table> <p>3. ORGANIZING/EXECUTING Consider effectiveness in assigning, communicating and accepting responsibility, authority, and accountability.</p>		Factor Value	%	O 0 E 0 ME 0 B 0 M 0 U 0	Provide detailed comments an examples
	Factor Value	%			
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;"></td> <td style="width: 15%; text-align: center;">Factor Value</td> <td style="width: 10%; text-align: center;">%</td> </tr> </table> <p>4. LEADING/DIRECTING Consider effectiveness in making decisions, selecting people, training and developing people, stimulating and energizing people, setting an example, and communicating with all levels of employees.</p>		Factor Value	%	O 0 E 0 ME 0 B 0 M 0 U 0	Provide detailed comments an examples
	Factor Value	%			

	Factor Value	%	
5. CONTROLLING/REGULATING Consider effectiveness in adhering to standards and policies, measuring results, correcting results.	O E ME B M U	θ θ θ θ θ θ	Provide detailed comments and examples

OVERALL RATING

Assess overall performance based on weighing the importance of each appraisal factor to the particular job being appraised.

(Check only one rating.)

- θ **OUTSTANDING** – Overall results **far exceed** expectations in **all major areas** of responsibility.
- θ **EXCEPTIONAL** – Overall results **consistently exceed** expectations in **most major areas** of responsibility.
- θ **EXCEEDS EXPECTATIONS** – **May exceed** expectations in some significant area(s).
- θ **MEETS EXPECTATIONS** – Overall results **consistently meet** expectations in **all major areas** of responsibility.
- θ **BELOW EXPECTATIONS** – Overall results are below expectations. May include performance that is improving but not yet meeting overall expectations, or performance that fell below a previously acceptable level. Improvement must be shown within 6 months or the rating will become “Marginal” OR “Unacceptable.”
- θ **MARGINAL** – Overall results **erratic and/or frequently below expectations**. Improvement must be shown within 3 months or the rating will become “Unacceptable.”
- θ **UNACCEPTABLE** – Overall results **consistently below expectations**. Improvement must be shown within a designated period or termination will occur.

PERSONAL DEVELOPMENT PLAN

List those areas that you believe the employee must focus on to improve performance to an acceptable level.

AREA	ACTION PLAN	DATE RESULTS EXPECTED
1.		
2.		
3.		
4.		

DEVELOPMENT OBJECTIVES

Assess last year's performance for each objective	List these projects and/or programs that are high priorities for next year. You may also include areas identified as challenges to increase performance to an above standard level.
LAST YEAR Summarize results achieved for each objective established for this appraisal period.	NEXT YEAR State the objectives agreed to for the next appraisal period.
1. State the objective: 0Exceeded 0Achieved 0Partially Achieved 0Failed to Achieve	1. State the objective and how it will be measured:
2. State the objective: 0Exceeded 0Achieved 0Partially Achieved 0Failed to Achieve	2. State the objective and how it will be measured:
3. State the objective: 0Exceeded 0Achieved 0Partially Achieved 0Failed to Achieve	3. State the objective and how it will be measured:
4. State the objective: 0Exceeded 0Achieved 0Partially Achieved 0Failed to Achieve	4. State the objective and how it will be measured:
5. State the objective: 0Exceeded 0Achieved 0Partially Achieved 0Failed to Achieve	5. State the objective and how it will be measured:

OTHER COMMENTS

Use this space to specify and evaluate any other factors you feel are significant to properly and totally appraise performance.

EMPLOYEE COMMENTS (optional)

The employee may use this space to handwrite any comments regarding this performance appraisal.

Appraiser's signature: _____

Date: _____

Reviewed by appraiser's supervisor: _____

Date: _____

Vice President's signature: _____

Date: _____

Employee's signature: _____

Date: _____

The employee's signature verifies that this appraisal was given and does not necessarily indicate that the employee agrees with the appraisal.