

STAFF PERFORMANCE APPRAISAL FORM

INSTRUCTION

This form is used for both performance setting and appraisal which covers probation appraisal and annual performance appraisal. The process and steps are as below:

Step 1: The staff member submits a self-performance plan/review, using the organization's Staff Performance Appraisal (SPA) form, to his or her supervisor.

Step 2: The supervisor then completes the SPA form.

Step 3: The supervisor and staff member meet to discuss the performance setting, appraisal based on performance plan, and the goals and plans for the coming year. They both should include any written comments, and they both have to sign the SPA form.

Step 4: The signed performance plan/review is submitted to the Executive Director for review and signature.

Step 5: the performance plan/review is submitted to HR professional to be included in the staff member's personnel file. Staff members may have a copy of the final appraisal document.

Staff performance appraisal is an important part of your development. We all deserve to hear about what we are doing well, and where we can improve. The annual staff performance review provides an opportunity to have a one-on-one conversation focused on your contributions to organization, learning opportunities, professional development, and future planning. The written form is only a part of the process. You and your supervisor are encouraged to have a discussion about the information on the form. Ideally, performance appraisal is an on-going process, with feedback provided throughout the year. The performance appraisal is an official document, and, as such, should be handled with the appropriate level of confidentiality.

OVERALL PERFORMANCE RATING DEFINITIONS

05 Outstanding Performance	All objectives and soft skills met and performed to the highest standards. Exceeded expectations on all activities delivered in the review period
04 Exceeds Expectations	All objectives and soft skills delivered to a satisfactory level, some objectives performed at a level which has exceeded expectations
03 Meets Expectations	Performance and soft skills consistently meet objectives to a satisfactory level, performs all duties in a timely fashion
02 Below Expectations	One or more key objectives and soft skills not performed to a satisfactory level without satisfactory explanation, some improvement required
01 Unsatisfactory	Objectives and soft skills consistently not met to a satisfactory level, attention required immediately

STAFF PERSONAL INFORMATION

Employee Name:			
Department:			
Reviewer:		Review Date:	
Type of review:	<input type="checkbox"/> Probation Performance		<input type="checkbox"/> Annual Performance
Start date with NGO:		Start date in current position:	

SECTION 1 – PERFORMANCE PLAN AND REVIEW

OBJECTIVE SETTING AND REVIEW

3 – 4 objectives should be set and agreed between line manager and staff member at start of review period. At the time of the performance appraisal the staff member should fill in comments before meeting with line manager, who will then add comments during/after the discussion. The review of objectives should not happen once a year, it should be an ongoing process to ensure successful achievement of objectives- Supervisor and supervisee should discuss (but not score) as necessary so that year end result does not come as a surprise to both sides.

1.1: TECHNICAL SKILLS

OBJECTIVES

Objective 1:

Actions:	Results Achieved: (What have been achieved?)														
Rating (Please circle only one rating)	Staff self-rating					Supervisor rating					Agreed rating				
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
Staff Member Comments in supporting the rating above:															
Supervisor Comments in supporting the rating above:															

Objective 2:

Actions:	Results Achieved: (What have been achieved?)														
Rating (Please circle only one rating)	Staff self-rating					Supervisor rating					Agreed rating				
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
Staff Member Comments in supporting the rating above:															
Supervisor Comments in supporting the rating above:															

Objective 3:

Actions:	Results Achieved: (What have been achieved?)														
Rating (Please circle only one rating)	Staff self-rating					Supervisor rating					Agreed rating				
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
Staff Member Comments in supporting the rating above:															
Supervisor Comments in supporting the rating above:															

Objective 4:															
Actions:							Results Achieved: (What have been achieved?)								
Rating (Please circle only one rating)	Staff self-rating					Supervisor rating					Agreed rating				
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
Staff Member Comments in supporting the rating above:															
Supervisor Comments in supporting the rating above:															
Objective 5:															
Actions:							Results Achieved: (What have been achieved?)								
Rating (Please circle only one rating)	Staff self-rating					Supervisor rating					Agreed rating				
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
Staff Member Comments in supporting the rating above:															
Supervisor Comments in supporting the rating above:															

1.2 SOFT SKILLS

1.2.1 Team Work

Specific criteria 1: Does s/he show concrete evidence of working well with others (stakeholders, colleagues, other organizations)															
Rating (Please circle only one rating)	Staff self-rating					Supervisor rating					Agreed rating				
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
Staff Member Comments in supporting the rating above:															
Supervisor Comments in supporting the rating above:															
Specific criteria 2: Is s/he willing to help others and acknowledges help of others for successful work?															
Rating (Please circle only one rating)	Staff self-rating					Supervisor rating					Agreed rating				
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
Staff Member Comments in supporting the rating above:															
Supervisor Comments in supporting the rating above:															

Specific criteria 3: Does s/her show tact and understanding of colleagues															
Rating (Please circle only one rating)	Staff self-rating					Supervisor rating					Agreed rating				
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
Staff Member Comments in supporting the rating above:															
Supervisor Comments in supporting the rating above:															

1.2.2 Communications

Specific criteria 1: Is s/he a good listener (well listen, attentively and willing to do) ?															
Rating (Please circle only one rating)	Staff self-rating					Supervisor rating					Agreed rating				
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
Staff Member Comments in supporting the rating above:															
Supervisor Comments in supporting the rating above:															
Specific criteria 2: Is s/he able to clarify complex ideas so that they are understandable?															
Rating (Please circle only one rating)	Staff self-rating					Supervisor rating					Agreed rating				
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
Staff Member Comments in supporting the rating above:															
Supervisor Comments in supporting the rating above:															

1.2.3 Self-Management

Specific criteria 1: Does s/he manage tasks independently with effectiveness and efficiency manner?															
Rating (Please circle only one rating)	Staff self-rating					Supervisor rating					Agreed rating				
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
Staff Member Comments in supporting the rating above:															
Supervisor Comments in supporting the rating above:															
Specific criteria 2: Does s/he follow through on responsibilities?															
Rating (Please circle only one rating)	Staff self-rating					Supervisor rating					Agreed rating				
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5

Staff Member Comments in supporting the rating above:	
Supervisor Comments in supporting the rating above:	

1.2.4 Leadership

Specific criteria 1: Can s/he motivate staff and/or colleagues?															
Rating (Please circle only one rating)	Staff self-rating					Supervisor rating					Agreed rating				
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
Staff Member Comments in supporting the rating above:															
Supervisor Comments in supporting the rating above:															
Specific criteria 2: Does s/he make “space” for colleagues to engage or feedbacks/comments?															
Rating (Please circle only one rating)	Staff self-rating					Supervisor rating					Agreed rating				
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
Staff Member Comments in supporting the rating above:															
Supervisor Comments in supporting the rating above:															
Specific criteria 3: Does s/he share technical knowledge with staff and/or colleagues?															
Rating (Please circle only one rating)	Staff self-rating					Supervisor rating					Agreed rating				
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
Staff Member Comments in supporting the rating above:															
Supervisor Comments in supporting the rating above:															
Specific criteria 4: Can s/he be held accountable for short-term and long-term impact of potential decisions made?															
Rating (Please circle only one rating)	Staff self-rating					Supervisor rating					Agreed rating				
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
Staff Member Comments in supporting the rating above:															
Supervisor Comments in supporting the rating above:															

Link to Organizational strategic outcomes:

Please comment briefly on how your objectives support organization strategic outcomes as outlined below: (Your objectives may not support all organization outcomes but must support at least one)

Objective 01:
Objective 02:
Objective 03:
Objective 04:
CHALLENGES
Please describe any significant obstacles to achieving your objectives, and any aspects of your role that you have found to be the most challenging.

PERSONAL DEVELOPMENT

Please list up to 3 areas you need to develop in the review period to allow you to achieve your objectives successfully (Include actions on how this may be achieved, comments should be made at end of review period)

Development Area 1: (Focus on doable areas)	Staff Member Comments:
	Action point and deadline:
	Line Manager Comments:
	Action point and deadline:
Development Area 2:	Staff Member Comments:
	Action point and deadline:
	Line Manager Comments:
	Action point and deadline:
Development Area 3:	Staff Member Comments:
	Action point and deadline:
	Line Manager Comments:
	Action point and deadline:

SECTION 2 – OVERALL PERFORMANCE SUMMARY

OVERALL PERFORMANCE RATING FINAL	Staff self-rating					Supervisor rating					Agreed rating				
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5

Staff Member Comments: (Complete this section after performance discussion and rating agreed, and staff member has read line manager comments)

Signature:	Date:

Line Manager Comments: (Complete this section after performance discussion and rating agreed)

Signature:	Date:

Final Executive Director Comments:

Signature:	Date: