**MANAGEMENT PERFORMANCE APPRAISAL**

**EMPLOYEE:**

**JOB TITLE:**

**DEPARTMENT:**

**MANAGER:**

**PERIOD OF EVALUATION:**

 **FROM:**

 **TO:**

**PART I – INSTRUCTIONS**

This evaluation form lists the criteria and competencies against which you must rank the employee. MLIB considers these performance factors to be critical to the success of personal, departmental, and company goals.

The criteria listed in this evaluation should accurately reflect the employee’s overall performance as it relates to the duties/expectations set forth in his or her job description.

Rate the employee in each section of this form according to the table below. Be sure to add comments, thoughts, and observations are important to the evaluation process.

|  |
| --- |
| **EXCELLENT** – Consistently exceeds job requirements; top performer in all areas; frequently makes accomplishments in areas outside normal job role. |
| **EXCEEDS EXPECTATIONS** – Often exceeds job requirements; consistently meets goals and objectives; accomplishments occasionally made in areas outside normal job roles. |
| **MEETS EXPECTATIONS** – Performs job duties at a satisfactory level according to job description, under normal supervision and direction. |
| **NEEDS IMPROVEMENT** – Occasionally fails to meet job duties and expectations; considerable improvement needed to meet job requirements. |
| **UNACCEPTABLE** – Consistently fails to meet job duties and expectations; performs at a level demonstrably below corporate requirements; improvement required immediately to maintain employment. |

|  |
| --- |
| **ABILITIES, KNWOLEDGE AND SKILLS** |
| Definition Takes personal ownership and responsibility for the quality and timeliness of work commitments. Follows organizational guidelines, professional standards, regulations and principles. Demonstrates reliability and integrity on a daily basis.  |
| **□EXCELLENT □EXCEEDS EXPECTATIONS □MEETS EXPECTATIONS □NEEDS IMPROVEMENT** **□UNACCEPTABLE** |
| **Key Actions** * Responds to job related commitments by meeting deadlines and being reliable.
* Reviews and assumes additional responsibilities.
* Balances organizational, team and individual commitments.
* Evaluates and responds to complex requirements that support organizational direction.
 |

|  |
| --- |
| **ADAPTABILITY** |
| Definition Adapting and responding to changing conditions, priorities, technologies and requirements. Recognizing new information and ideas with a willingness to alter opinions and behaviours. Applying versatility, reasoning and innovativeness in the face of change. Ability to comfortably collaborate in a variety of situations and with diverse individuals.  |
| **□EXCELLENT □EXCEEDS EXPECTATIONS □MEETS EXPECTATIONS □NEEDS IMPROVEMENT****□UNACCEPTABLE** |
| **Key Actions** * Responds positively to changing needs and conditions.
* Continuously adapts his/her behaviours and approaches to address specific situations.
* Recognizes potential situations and responds with solutions, tactics or approaches to reduce or eliminate issues.
* Plans and initiates complex changes in order to enhance the organization.
 |

|  |
| --- |
| **ANALYTICAL THINNKING** |
| Definition Applying systematic, logical reasoning when addressing problems or situations in order to arrive at an appropriate solution or outcome. Considers the various issues and components of the problem, develops sequential steps to address the situation and determines rational timeframes and priorities.  |
| **□EXCELLENT □EXCEEDS EXPECTATIONS □MEETS EXPECTATIONS □NEEDS IMPROVEMENT** **□UNACCEPTABLE** |
| **Key Actions** * Responds to and recognizes discrepancies and components of a situation.
* Continuously considers the components of a situation in order to determine an appropriate solution.
* Recognizes situations and examines facts in order to develop clear steps and solid assumptions.
 |

|  |
| --- |
| **COMMUNICATION** |
| Definition Expressing and transmitting information with consistency and clarity, using active listening techniques in order to effectively understand provided feedback, summarizing information according to the audience in order to promote engagement and increase understanding.  |
| **□EXCELLENT □EXCEEDS EXPECTATIONS □MEETS EXPECTATIONS □NEEDS IMPROVEMENT****□UNACCEPTABLE** |
| **Key Actions** * Effectively listens and communicates.
* Ensures that communication efforts meet the needs of various groups and is properly understood.
* Adapts communication to respond to audience or situational requirements.
 |

|  |
| --- |
| **DECISION MAKING** |
| Definition Makes concrete, well-informed and thought out decisions that support the overall organization. Has the ability to make quick effective decisions even when data and details are limited. When making unfavourable decisions that might have negative consequences will examine the impacts and potential implications to ensure that decision is valid for the situation. |
| **□EXCELLENT □EXCEEDS EXPECTATIONS □MEETS EXPECTATIONS □NEEDS IMPROVEMENT****□UNACCEPTABLE** |
| **Key Actions** * Responds to work responsibilities and situations by making decisions that are common practice and expected of the position.
* Is able to adapt decision making based on circumstances or when presented with unclear information.
* Makes decisions on the fly or in the face of missing information that supports the organization even if it may be perceived as unfavourable.
* Makes strategic decisions that support the organization while clearly identifying current and future impacts or implications.
 |

|  |
| --- |
| **LEADERSHIP** |
| Does the employee work well with peers and supervisors? Does the employee willingly contribute to the success of the team or department? Does the employee exhibit consideration for others; a willingness to help; maintain a rapport with co-workers? |
| **□EXCELLENT □EXCEEDS EXPECTATIONS □MEETS EXPECTATIONS □NEEDS IMPROVEMENT** **□UNACCEPTABLE** |
| **Key Actions** * Responds positively to changing needs and conditions.
* Promotes and builds internal commitment.
* Builds on the strengths of the workplace and reduces internal weaknesses through training and development.
 |

|  |
| --- |
| **ORGANIZATION AWARENESS & ENVIRONMENTAL AWARENESS** |
| Definition Shows commitment to the organizational vision and strategic goals by acting in accordance to organizational expectations and through having a solid understanding of the internal environment. Uses knowledge of organizational and business climate to solve issues and accomplish goals and business strategies, complies with and enforces organizational policies, procedures and practices. |
| **□EXCELLENT □EXCEEDS EXPECTATIONS □MEETS EXPECTATIONS □NEEDS IMPROVEMENT** **□UNACCEPTABLE** |
| **Key Actions** * Responds appropriately to organizational operations with a solid understanding of the mission, vision and values.
* Continuously aligns position to overall objectives of the organization.
* Aligns the internal environment to the overall direction of the organization.
 |

|  |
| --- |
| **PLANNING** |
| Definition Accurately estimates duration and level of difficulty of tasks and projects, setting out goals and objectives and work plans to complete.  |
| **□EXCELLENT □EXCEEDS EXPECTATIONS □MEETS EXPECTATIONS □NEEDS IMPROVEMENT** **□UNACCEPTABLE** |
| Definition Accurately estimates duration and level of difficulty of tasks and projects, setting out goals and objectives and work plans to complete.  |

|  |
| --- |
| **PROBLEM SOLVING** |
| Definition The ability to break a situation down into smaller pieces to identify key issues and determine cause and effect relationships. Using logic and analytical methods to come to realistic solution.  |
| **□EXCELLENT □EXCEEDS EXPECTATIONS □MEETS EXPECTATIONS □NEEDS IMPROVEMENT****□UNACCEPTABLE** |
| **Key Actions** * Responds to issues by offering solutions that fall within the positional responsibilities, involves others as required.
* Considers the issue from various angles, develops multiple solutions and adapts approach where and when required.
* Analyzes complex issues to develop approaches or solutions that are considered forward thinking and best practice.
 |

|  |
| --- |
| **RESOURCE AND FISCAL MANAGEMENT** |
| Definition Using resources such as human capital, supplies, products, materials and other useable items effectively and with foresight to available and limited funds.  |
| **□EXCELLENT □EXCEEDS EXPECTATIONS □MEETS EXPECTATIONS □NEEDS IMPROVEMENT****□UNACCEPTABLE** |
| **Key Actions** * Controls and limits the use of internal resources.
* Understands and appreciates the time restrictions of others; limits questioning and conversations to essential requirements of the position.
* Analyzes job duties to determine wasteful practices that could be improved for greater efficiency.
* Prioritizes and streamlines work to maximize working hours while reducing overtime requirements.
* Schedules staff to ensure that responsibilities and obligations are fulfilled while limiting overtime requirements.
 |

|  |
| --- |
| **RESULTS ORIENTATION** |
| Definition The ability to focus on desired outcomes, and the means by which they are achieved, by meeting and or exceeding standards based on past performance, goals and objectives, as well as the performance and/or achievements of others.  |
| **□EXCELLENT □EXCEEDS EXPECTATIONS □MEETS EXPECTATIONS □NEEDS IMPROVEMENT****□UNACCEPTABLE** |
| **Key Actions** * Operates with high attention to detail regarding organizational and departmental performance goals.
* Continuously strives to meet or exceed organizational and departmental goals and objectives.
* Demonstrates a focus on finishing all tasks assigned in a timely manner while taking complete ownership of tasks.
* Holds oneself and others accountable for effectively meeting and exceeding organizational and departmental goals.
 |

|  |
| --- |
| **SERVICE ORIENTATION** |
| Definition Providing superior service to both internal and external customers.  |
| **□EXCELLENT □EXCEEDS EXPECTATIONS □MEETS EXPECTATIONS □NEEDS IMPROVEMENT** **□UNACCEPTABLE** |
| **Key Actions** * Responding to client needs and internal requests.
* Follows through on commitments and responds to inquires, emails, requests and complaints in a timely fashion.
* Working on a continuous basis to meet or exceed client and organizational needs.
* Go above and beyond regular client and organizational expectations by offering added value.
 |

|  |
| --- |
| **STRATEGIC THINKING** |
| Definition Analyzes and interprets the strategic direction of the organization and has a clear understanding of the vision, mission, values and objectives using this information to develop responsibilities, tasks, goals and initiatives. Reflects on past experiences, organizational practices and processes to determine the correct course of action. Is able to analyze the internal and external environment in order to identify current and future opportunities, challenges and risks.  |
| **□EXCELLENT □EXCEEDS EXPECTATIONS □MEETS EXPECTATIONS □NEEDS IMPROVEMENT****□UNACCEPTABLE** |
| **Key Actions** * Has a clear understanding of organizational objectives and aligns position to strategic requirements.
* Gathers and analyzes organizational information by using past experience and knowledge.
* Aligns the internal environment to the overall objectives and strategies of the organization.
* Engages others within the workplace and team to organizational objectives and strategies, links positions and teams by communicating the importance of roles and tasks.
 |

|  |
| --- |
| **TEAM WORK** |
| Definition Works cooperatively and effectively with others to reach a common goal. Actively participates in group activities in an effort to foster a positive and productive team environment.  |
| **□EXCELLENT □EXCEEDS EXPECTATIONS □MEETS EXPECTATIONS □NEEDS IMPROVEMENT** **□UNACCEPTABLE** |
| **Key Actions** * Participates in team or group activities, offers help to team members.
* Shares ideas, concerns and solutions with the team.
* Encourages others to participating in team activities, ensures teams are working effectively.
* Places a high value on teamwork and sets values and objectives that encourage team cohesiveness.
 |

|  |
| --- |
| **GOALS**  |
| List and discuss the goals set forth for this employee during the period under review. Identify those areas of responsibility where the employee did/did not meet performance goals and/or project milestones. Evaluate the progress made by the employee on predetermined goals, projects, job duties, and special assignments by selecting the appropriate box below each goal listed. |
| **Goal #1: REVIEW PERIOD** |
| **Goal #1: OUTCOME** |
| **Satisfactory Progress**  | **Unsatisfactory Progress**  |
| **Goal #2: REVIEW PERIOD** |
| **Goal #2: OUTCOME** |
| **Satisfactory Progress**  | **Unsatisfactory Progress**  |
| **Goal #3: REVIEW PERIOD** |
| **Goal #3: OUTCOME** |
| **Satisfactory Progress**  | **Unsatisfactory Progress**  |

|  |
| --- |
| **OVERALL ASSESSMENT** |
| Use this space to specify the employee’s overall job performance. The overall rating should reflect and take into account job criteria, behavioral, supervisory, and goal completion ranking. |
| **□EXCELLENT □EXCEEDS EXPECTATIONS □MEETS EXPECTATIONS □NEEDS IMPROVEMENT****□UNACCEPTABLE** |
| Comments: |

**Managers Signature:**

**Date:**

**PART VII – EMPLOYEE SIGNOFF**

|  |
| --- |
| I have been advised of my performance rankings. The rankings and comments in this review have been discussed and explained to me by my supervisor. I understand the implications, the consequences of failing to improve my performance. My own comments are as follows: |
|  |
|  |
|  |
|  |
|  |
|  |
|  |
|  |

**Employee Signature:**

**Date:**