### Performance Appraisal Template

### Performance Appraisal Instructions

(If you are using this template to complete a performance appraisal, delete these instructions before filing the copy of the template)

#### Step 1: Enter Job Performance Requirements into Template

Fill in the job performance requirements (JPRs) in Section 1. Fill them in for both Part A (employee’s view) and Part B (manager’s view). The JPRs should be derived from the following areas:

* The employee’s job description document,
* Goals agreed at the employee’s previous appraisal,
* Any operational goals that have been discussed and agreed with the employee as being a job performance requirement.

#### Step 2: Employee Self-Appraisal

Provide Section 1 Part A to the employee at least one week before the scheduled appraisal meeting.

The employee should appraise the quality of their own performance by assigning weightings to each job performance requirement, and ticking the box which matches their perceived performance. Ratings should be expressed as a percentage and should add up to 100% across all five JPRs.

Once the JPRs section is completed, the employee should assign themselves a rating out of 5 for their overall performance (see table over page):

|  |  |  |
| --- | --- | --- |
| Rating | Meaning | Detail |
| 1 | Inadequate | Consistently unable to do the job. |
| 2 | Needs training | Needs additional training or other development to meet job requirements. |
| 3 | Good | Met all job requirements and may exceed them at times. |
| 4 | Outstanding | Regularly exceeds the requirements of the job. |
| 5 | Exceptional | Far exceeds requirements and expectations. |

For the remainder of the items in Section 1 Part B, the employee needs only to make comments and assign a rating.

The employee may make their own comments if they wish.

#### Step 3: Appraise Employee

Complete Section 1 Part B.

Assign a weighting to each job performance requirement (JPR), and tick the box which matches the employee’s performance. Ratings should be expressed as a percentage and should add up to 100% across all five JPRs. The relative weighting of the JPRs should be clear from the previous appraisal and from informal feedback and discussions between appraisals.

Once the JPRs section is completed, you should assign the employee a rating out of five for their overall performance:

|  |  |  |
| --- | --- | --- |
| Rating | Meaning | Detail |
| 1 | Inadequate | Consistently unable to do the job. |
| 2 | Needs training | Needs additional training or other development to meet job requirements. |
| 3 | Good | Met all job requirements and may exceed them at times. |
| 4 | Outstanding | Regularly exceeds the requirements of the job. |
| 5 | Exceptional | Far exceeds requirements and expectations. |

For the remainder of the items in Section 1 Part B, you need only to make comments and assign a rating.

All written comments should explain the factual basis of the rating in each category, including the overall appraisal.

You may add additional comments if you wish.

#### Step 4: Conduct Appraisal of Past Performance

Meet with the employee to discuss the appraisal. Discrepancies between the employee’s view and the manager’s view of performance should inform the beginning of a discussion about performance, seeking at first to eliminate misunderstandings about judgements.

#### Step 5: Set Future Plans

Section 2 of the document concerns setting plans for the future including any developmental work appropriate to prepare the employee for career progress or remediate inadequate performance or perceptions (on behalf of the employee or the manager) of inadequate competence. Job performance requirements are also set for the next six months. It also includes a section for comment about the employee’s career desires and prospects.

Both the employee and the supervisor must remember an appraisal is a time for clarity and honesty about performance and competence and the development work required to allow an employee to fully reach the potential they desire and are able to reach. An appraisal should reinvigorate employees at all levels of performance to take the next step in improving their performance in an existing role or accepting a challenge in a new role.

#### Step 6: Obtain Signatures and Process Appraisal

Obtain the employee’s signature on the front of the appraisal form, then sign and date the form before forwarding it to your manager for approval and records storage.

### Section 1: Evaluation of Past Performance

### Part A: Employee’s View

Please complete the following tables.

#### Evaluation of quality of work

Evaluate the quality of your work.

| Job Performance Requirements (JPRs) | Ability to meet standards |
| --- | --- |
| Does not meet standards | Meets standards | Exceeds standards |
| JPR #1: | [ ]  | [ ]  | [ ]  |
| Weighting: |
| Comments: |
| JPR #2: | [ ]  | [ ]  | [ ]  |
| Weighting: |
| Comments: |
| JPR #3: | [ ]  | [ ]  | [ ]  |
| Weighting: |
| Comments: |
| JPR #4: | [ ]  | [ ]  | [ ]  |
| Weighting: |  |
| Comments: |
| JPR #5: | [ ]  | [ ]  | [ ]  |
| Weighting: |
| Comments: |
| Other factors contributing to overall evaluation: |
| Overall evaluation of quality of work | Does not meet standards | Meets standards | Exceeds standards |
| [ ]  | [ ]  | [ ]  |

#### Quantity of work

Do you meet deadlines and output expectations?

|  |
| --- |
| Comments: |
| Overall evaluation of quantity of work | Rating |
| 1 | 2 | 3 | 4 | 5 |
| [ ]  | [ ]  | [ ]  | [ ]  | [ ]  |

#### Job knowledge

Do you understand your duties? Do you have the required skills to execute your duties to BCG standards?

|  |
| --- |
| Comments: |
| Overall evaluation of job knowledge | Rating |
| 1 | 2 | 3 | 4 | 5 |
| [ ]  | [ ]  | [ ]  | [ ]  | [ ]  |

#### Initiative

Do you begin and complete assignments on your own?

|  |
| --- |
| Comments: |
| Overall evaluation of initiative | Rating |
| 1 | 2 | 3 | 4 | 5 |
| [ ]  | [ ]  | [ ]  | [ ]  | [ ]  |

#### Dependability

Do you reliably complete assignments and responsibilities?

|  |
| --- |
| Comments: |
| Overall evaluation of dependability | Rating |
| 1 | 2 | 3 | 4 | 5 |
| [ ]  | [ ]  | [ ]  | [ ]  | [ ]  |

#### Adaptability

Do you accept and understand new methods and approaches?

|  |
| --- |
| Comments: |
| Overall evaluation of adaptability | Rating |
| 1 | 2 | 3 | 4 | 5 |
| [ ]  | [ ]  | [ ]  | [ ]  | [ ]  |

|  |  |
| --- | --- |
| Overall appraisal | Rating |
| 1 | 2 | 3 | 4 | 5 |
| [ ]  | [ ]  | [ ]  | [ ]  | [ ]  |

### Part B: Manager’s View

Please complete the following tables.

#### Evaluation of quality of work

Evaluate the quality of the employee’s work.

| Job Performance Requirements (JPRs) | Ability to meet standards |
| --- | --- |
| Does not meet standards | Meets standards | Exceeds standards |
| JPR #1: | [ ]  | [ ]  | [ ]  |
| Weighting: |
| Comments: |
| JPR #2: | [ ]  | [ ]  | [ ]  |
| Weighting: |
| Comments: |
| JPR #3: | [ ]  | [ ]  | [ ]  |
| Weighting: |
| Comments: |
| JPR #4: | [ ]  | [ ]  | [ ]  |
| Weighting: |  |
| Comments: |
| JPR #5: | [ ]  | [ ]  | [ ]  |
| Weighting: |
| Comments: |
| Other factors contributing to overall evaluation: |
| Overall evaluation of quality of work | Rating |
| 1 | 2 | 3 | 4 | 5 |
| [ ]  | [ ]  | [ ]  | [ ]  | [ ]  |

#### Quantity of work

Does the employee meet deadlines and output expectations?

|  |
| --- |
| Comments: |
| Overall evaluation of quantity of work | Rating |
| 1 | 2 | 3 | 4 | 5 |
| [ ]  | [ ]  | [ ]  | [ ]  | [ ]  |

#### Job knowedge

Does the employee understand your duties? Do they have the required skills to execute their duties to BCG standards?

|  |
| --- |
| Comments: |
| Overall evaluation of job knowledge | Rating |
| 1 | 2 | 3 | 4 | 5 |
| [ ]  | [ ]  | [ ]  | [ ]  | [ ]  |

#### Initiative

Does the employee begin and complete assignments on their own?

|  |
| --- |
| Comments: |
| Overall evaluation of initiative | Rating |
| 1 | 2 | 3 | 4 | 5 |
| [ ]  | [ ]  | [ ]  | [ ]  | [ ]  |

#### Dependability

Does the employee reliably complete assignments and responsibilities?

|  |
| --- |
| Comments: |
| Overall evaluation of dependability | Rating |
| 1 | 2 | 3 | 4 | 5 |
| [ ]  | [ ]  | [ ]  | [ ]  | [ ]  |

#### Adaptability

Does the employee accept and understand new methods and approaches?

|  |
| --- |
| Comments: |
| Overall evaluation of adaptability | Rating |
| 1 | 2 | 3 | 4 | 5 |
| [ ]  | [ ]  | [ ]  | [ ]  | [ ]  |

|  |  |
| --- | --- |
| Overall appraisal | Rating |
| 1 | 2 | 3 | 4 | 5 |
| [ ]  | [ ]  | [ ]  | [ ]  | [ ]  |

### Section 2: Future Performance and Development

#### Goals for the next six months

Set performance goals for the next six months

| Goal | Performance standard | Review date |
| --- | --- | --- |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

|  |  |  |
| --- | --- | --- |
| Suitability and desire for progression | Yes | No |
| Is the employee capable of further progression now? | [ ]  | [ ]  |
| Does the employee desire a career in hospitality? | [ ]  | [ ]  |

|  |
| --- |
| Employee’s comments on career goals: |
| Manager’s comments on career goals: |

Development areas to aid career progression

| Development area | Project/training | Review date |
| --- | --- | --- |
|  |  |  |
|  |  |  |
|  |  |  |

#### Job performance requirements for the next six months

Set job performance requirements for the next six months. These JPRs may be drawn from the employee’s job description or from any goals or development targets set in this appraisal. Refer back to this document when conducting the next appraisal.

|  |  |
| --- | --- |
| JPR #1: | Weighting: |
| JPR #2: | Weighting: |
| JPR #3: | Weighting: |
| JPR #4: | Weighting: |
| JPR #5: | Weighting: |

### Overall comments

|  |
| --- |
| Employee’s comments: |
| Manager’s comments: |

### Signatures and Approvals

|  |  |
| --- | --- |
| Employee name: |  |
| Employee Café/ department: |  |
| Reviewer: |  |

#### Signatures

#### Appraisal completed

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |
| Employee |  | Supervisor |  | Date |

#### Appraisal approved

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |
| Manager |  | Date |  |  |

#### Appraisal processed

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |
| HR Manager |  | Date |  |  |