APPENDIX 14M – EMPLOYERS’ HANDBOOK *(Remove comments in red before issuing)*

**SAMPLE TYPE 1 - PERFORMANCE REVIEW FORM**

NAME:

JOB TITLE:

REPORTING PERIOD:

**SECTION 1 - OBJECTIVES (as agreed between Manager and Employee)**

Objective 1 - Summary of achievement against objective 1

|  |
| --- |
| Interim Review |

|  |
| --- |
| Final Review |

Objective 2 - Summary of achievement against objective 2

|  |
| --- |
| Interim Review |

|  |
| --- |
| Final Review |

Objective 3 - Summary of achievement against objective 3

|  |
| --- |
| Interim Review |

|  |
| --- |
| Final Review |

Objective 4 - Summary of achievement against objective 4

|  |
| --- |
| Interim Review |

|  |
| --- |
| Final Review |

Objective 5 - Summary of achievement against objective 5

|  |
| --- |
| Interim Review |

|  |
| --- |
| Final Review |

**SECTION 2 – COMPETENCIES**

Comment briefly on your achievement against the competencies for your job

|  |  |  |
| --- | --- | --- |
| Competency | Enter level required for your job (1/2/3) | Comments |
| Focusing on customers |  |  |
| Developing skills and knowledge |  |  |
| Achieving results |  |  |
| Teamwork  |  |  |
| Communicating effectively |  |  |
| Solving problems |  |  |
| Being flexible and embracing change  |  |  |
| Using initiative  |  |  |
| Knowing the business  |  |  |
| Being creative and innovative  |  |  |
| Leading others  |  |  |
| Planning and organising  |  |  |
| Making effective decisions  |  |  |

**SECTION 3 - PERSONAL DEVELOPMENT**

This section enables people to reflect on what they are good at and what areas they would like to develop

**Current strengths**

|  |
| --- |
|  |

**Future career plans and aspirations**

Summarise what you would like to be doing in the short, medium and longer term

|  |
| --- |
|  |

**Personal Development Plan (PDP)**

This is an opportunity to maintain a focus on personal development and can form a basis for discussion between the employee and line manager

|  |  |  |
| --- | --- | --- |
| Area of development | How will this be developed | By when |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

**SECTION 4 - INTERIM REVIEW**

This section is for brief overall summary comments for the half year by the employee and line manager, together with assessment level agreed after discussion at the interim review. If agreement is not reached, a comment to this effect should be recorded by both the employee and manager in the summary section.

|  |
| --- |
| Employee summary comments for half year |

|  |
| --- |
| Manager summary comments for half year |

Indicative interim assessment level. This is based on performance to date against objectives and competencies and can change in line with full year performance.

|  |
| --- |
| Indicative interim assessment level |
| Satisfactory Performance |
| Unsatisfactory Performance |

**SECTION 5 - FINAL REVIEW**

This section is for brief overall summary comments for the full year by the employee and line manager, together with assessment level agreed after discussion at the final review. If agreement is not reached, a comment to this effect should be recorded by both the employee and line manager in the summary section.

Date of end of year review \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |
| --- |
| Employee summary comments for full year |

|  |
| --- |
| Manager summary comments for full year |

**FINAL ASSESSMENT LEVEL**

This is based on performance over the year against objectives and competencies

|  |  |
| --- | --- |
| Assessment | Description |
| Satisfactory performance | Objectives met and competencies fully demonstrated at required levels |
| Unsatisfactory performance | Performance unacceptable; objectives not met and competencies not demonstrated. Corrective action underway. |

SIGNATURES

Employee: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Line Manager: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Countersigning Manager: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |
| --- |
| Countersigning Manager’s comments: |