

## PERFORMANCE REVIEW YEAR 2021

Employee Name:

Employee Job Title:

Reviewer:

Employee ID:

Date Review Effective:

Reviewers and employees should keep this document close at hand and continually discuss and re-evaluate the objectives as appropriate throughout the year.

### Assessment Factors

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Did not meet expectations:

**Did not meet** all of the principal objectives/requirements of the position. May require additional training, guidance or time in the position to fully satisfy those objectives/requirements. Performance requires improvement.

Meets expectations:

Generally **meets** the key objectives/requirements of the position. May exceed objectives/requirements in some areas and fall short in one or two others, but overall performance satisfies the needs of the job.

Exceeds expectations:

**Exceeds** the key objectives/requirements of the position in most areas and **may far exceed** the expectations in some areas. Assumes additional responsibility and has demonstrated exceptional accomplishment.

## Business Objectives

**Beginning of the year:** Identify three to five of the main objectives being assigned for the review period and break it down into measurable components. Leave assessment blank until year-end.

**End of the year:** Indicate whether the employee **exceeded, met, or did not meet** these objectives, and explain your assessment.

| DEFINE BUSINESS OBJECTIVE                                          | SCORE OUT OF 5 |
|--------------------------------------------------------------------|----------------|
| Takes care and maintains tools to the expectations of the Business | 1 2 3 4 5      |
| Works well without supervision                                     | 1 2 3 4 5      |
| Turns up to work and is ready each day on time                     | 1 2 3 4 5      |

| ASSESSMENT                                                                                                 | COMMENTS |
|------------------------------------------------------------------------------------------------------------|----------|
| <input type="checkbox"/> Exceeded<br><input type="checkbox"/> Met<br><input type="checkbox"/> Did not meet |          |
| <input type="checkbox"/> Exceeded<br><input type="checkbox"/> Met<br><input type="checkbox"/> Did not meet |          |
| <input type="checkbox"/> Exceeded<br><input type="checkbox"/> Met<br><input type="checkbox"/> Did not meet |          |



SMALL  
BUSINESS  
NEW ZEALAND

|                                                                                                                                     |           |                                                                                                            |  |
|-------------------------------------------------------------------------------------------------------------------------------------|-----------|------------------------------------------------------------------------------------------------------------|--|
| Fills out time sheets correctly                                                                                                     | 1 2 3 4 5 | <input type="checkbox"/> Exceeded<br><input type="checkbox"/> Met<br><input type="checkbox"/> Did not meet |  |
| Keeps tidy worksite and is always conscious of the surroundings                                                                     | 1 2 3 4 5 | <input type="checkbox"/> Exceeded<br><input type="checkbox"/> Met<br><input type="checkbox"/> Did not meet |  |
| Is aware of onsite behavior and adheres to expectations                                                                             | 1 2 3 4 5 | <input type="checkbox"/> Exceeded<br><input type="checkbox"/> Met<br><input type="checkbox"/> Did not meet |  |
| General on site performance regarding checking that work has been completed according to specifications and task are done correctly | 1 2 3 4 5 | <input type="checkbox"/> Exceeded<br><input type="checkbox"/> Met<br><input type="checkbox"/> Did not meet |  |
| Insures Company Vehicles are kept in clean and tidy and no smoking is done in the vehicles                                          | 1 2 3 4 5 | <input type="checkbox"/> Exceeded<br><input type="checkbox"/> Met<br><input type="checkbox"/> Did not meet |  |
| Is willing to work extra hours when the business has extra work on.                                                                 | 1 2 3 4 5 | <input type="checkbox"/> Exceeded<br><input type="checkbox"/> Met<br><input type="checkbox"/> Did not meet |  |



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|                                                                |           |
|----------------------------------------------------------------|-----------|
| Adhere to expected beginning of day and end of day procedures. | 1 2 3 4 5 |
| Jobs are followed up until completion                          | 1 2 3 4 5 |
|                                                                | 1 2 3 4 5 |
|                                                                | 1 2 3 4 5 |
|                                                                | 1 2 3 4 5 |
|                                                                | 1 2 3 4 5 |

|                                                                                                            |  |
|------------------------------------------------------------------------------------------------------------|--|
| <input type="checkbox"/> Exceeded<br><input type="checkbox"/> Met<br><input type="checkbox"/> Did not meet |  |
| <input type="checkbox"/> Exceeded<br><input type="checkbox"/> Met<br><input type="checkbox"/> Did Not Meet |  |
| <input type="checkbox"/> Exceeded<br><input type="checkbox"/> Met<br><input type="checkbox"/> Did Not Meet |  |
| <input type="checkbox"/> Exceeded<br><input type="checkbox"/> Met<br><input type="checkbox"/> Did Not Meet |  |
| <input type="checkbox"/> Exceeded<br><input type="checkbox"/> Met<br><input type="checkbox"/> Did Not Meet |  |
| <input type="checkbox"/> Exceeded<br><input type="checkbox"/> Met<br><input type="checkbox"/> Did Not Meet |  |

## Training & Developing Plan

**Beginning of the year:** Based on the assessment of performance for last year, identify training and development objectives for the coming year. Break these down into measurable components to monitor results. **Any associated costs should be included in your budget for the coming year.**

**End of the year:** Indicate whether the employee **exceeded, met, or did not meet** these objectives, & explain your assessment.

| DEFINE DEVELOPMENT OBJECTIVES                                                                         | SPECIFIC MILESTONES TO BE MEASURED (include begin and end dates)                                                                                                                                                                                                                                           |
|-------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Example:<br/>Develop communication skills to the required level 3</p> <p>Associated cost: None</p> | <ol style="list-style-type: none"> <li>1. Participate in presenting the business case to senior management to obtain support for the investment by April 30, 15.</li> <li>2. Debrief the experience to understand what went well, and where/how we could have improved our influencing ability.</li> </ol> |

| ASSESSMENT                                                                                                 | EXPLANATION                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Exceeded<br><input type="checkbox"/> Met<br><input type="checkbox"/> Did not meet | <p>The employee spent spoke with me to understand the requirements and learn about the preferences/agendas of our audience. He then researched the issues required for the business case and worked with his mentor to determine how to “sell” the case. He prepared the business case thoroughly, anticipating and addressing some of the issues that would arise. He took on the prime responsibility of obtaining approval from the management team, with support from me on the tougher questions!</p> |



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|                  |                |                                                                                                            |  |
|------------------|----------------|------------------------------------------------------------------------------------------------------------|--|
| Associated cost: | 1.<br>2.<br>3. | <input type="checkbox"/> Exceeded<br><input type="checkbox"/> Met<br><input type="checkbox"/> Did not meet |  |
| Associated cost: | 1.<br>2.<br>3. | <input type="checkbox"/> Exceeded<br><input type="checkbox"/> Met<br><input type="checkbox"/> Did not meet |  |
| Associated cost: | 1.<br>2.<br>3. | <input type="checkbox"/> Exceeded<br><input type="checkbox"/> Met<br><input type="checkbox"/> Did not meet |  |
| Associated cost: | 1.<br>2.<br>3. | <input type="checkbox"/> Exceeded<br><input type="checkbox"/> Met<br><input type="checkbox"/> Did not meet |  |
| Associated cost: | 1.<br>2.<br>3. | <input type="checkbox"/> Exceeded<br><input type="checkbox"/> Met<br><input type="checkbox"/> Did not meet |  |

## Assessment of Core Values

| EXAMPLES                                                                                                 | ASSESSMENT                                                                                                  | EXPLANATION, IF REQUIRED |
|----------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------|--------------------------|
| <b>Dependability</b> is about being where you're expected to be, when you are expected to be there.      | <input type="checkbox"/> Exceeds<br><input type="checkbox"/> Meets<br><input type="checkbox"/> Did not me   |                          |
| <b>Teamwork</b> is about being supportive of others, pitching in or stepping up to help out when needed. | <input type="checkbox"/> Exceeds<br><input type="checkbox"/> Meets<br><input type="checkbox"/> Did not me   |                          |
| <b>Health and safety compliance</b> is about following health and safety requirements at all times.      | <input type="checkbox"/> Exceeds<br><input type="checkbox"/> Meets<br><input type="checkbox"/> Did not meet |                          |

## Assessment Summary

The assessment summary is a qualitative judgment based on the assessment of objectives and adherence to the organization's core values. It sums up an employee's overall contribution to the organization.

### Overall Assessment:

- ☐ Exceeds expectations
 ☐ Meets expectations
 ☐ Did not meet expectations

**Reviewer comments supporting the overall assessment:**

**Employee comments:** *This assessment provides the employee and future readers of this document with a record of achievements during this review period. The employee is encouraged to comment.*

**Signatures:** The employee and reviewer must sign the final document to acknowledge the discussion and agreement of the content and to commit to attaining the assigned objectives.

**As the employee, your signature on this form indicates that you have read and discussed the contents with your reviewer, and that you understand how your performance will be assessed for the next year. As the reviewer, your signature indicates that you have prepared and discussed this assessment with the employee and you commit to support the employee in delivering to the objectives defined.**

Signature: \_\_\_\_\_  
(Employee)

Date: \_\_\_\_\_

Signature: \_\_\_\_\_  
(Reviewer)

Date: \_\_\_\_\_