

Numerical Scale Performance Review

A comprehensive 1-5 evaluation with a self-assessment, anchored ratings, and a New-to-role option.

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EMPLOYEE NAME

JOB TITLE

SUPERVISOR

DEPARTMENT

PERFORMANCE PERIOD

DATE OF REVIEW

RATING KEY

- 5 Exceptional — performance consistently and significantly exceeds expectations
- 4 Highly effective — performance frequently exceeds expectations
- 3 Proficient — performance consistently meets expectations
- 2 Inconsistent — performance meets some, but not all, expectations
- 1 Unsatisfactory — performance consistently falls below expectations
- N/A New to role — too recent to evaluate fairly; review at a later agreed date

A. Employee self-assessment

Completed by the employee before the review meeting.

Key accomplishments this period (with examples)

Challenges faced and how you addressed them

Skills or areas you would like to develop

B. Performance competencies

Completed by the manager. Rate each competency using the key on page 1.

COMPETENCY	5	4	3	2	1	N/A
1. Quality and accuracy of work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Planning, organizing, and prioritizing workload	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Accountability and follow-through on responsibilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Communication with manager, peers, and customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Collaboration and teamwork	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Independent work and self-direction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Problem-solving, decision-making, and judgment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Improving processes and ways of working	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Willingness to take on additional responsibility	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Reliability: attendance, punctuality, and deadlines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

For people managers only

COMPETENCY	5	4	3	2	1	N/A
11. Sets clear expectations and gives timely feedback	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Develops team members and supports their growth	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Delegates effectively based on skills and potential	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Builds a fair and inclusive team environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Examples and evidence supporting the ratings above

C. Performance summary

Areas of exceptional performance (with specific examples)

Areas needing attention or improvement (with specific examples)

D. Goals & development planning

Performance goals for the next period

Development actions and training planned

How the manager will provide guidance and support

E. Employee comments

The employee may comment on this review below (optional)

Employee signature

Date

Manager signature

Date