



# Performance Measures & Evaluation Form

## How Work is Managed

### Outcomes

- Provide managers with a form to review performance.
- Provide employees with a form to plan performance.
- Simplify measuring success and performance.

## Performance Measures & Evaluation Form

Performance planning forms are to be completed by employees and finalised with oversight from a manager.

Performance review forms are to be completed by a manager.

Performance reviews should be completed as required by the company's performance management framework to ensure employees are functioning at or above a level of expectation. If you do not currently have a framework, or if this needs review, EMA can help you. These reviews allow the identification of areas of strengths and weaknesses and provide an opportunity to assess talent or the cause of poor performance and address it. The following templates in this form will allow employees to set performance expectations for themselves, ensuring they have a plan to achieve these expectations and a timeframe for attaining these goals.

This how to guide will cover:

- Employee performance planning, timeframes and measures for success.
- Expectations and criteria checklist based on company values.
- Performance against Key Performance Indicators (KPIs) and behaviours.
- A rating table for finalised review status.

## How to Fill These Forms

Employee performance planning:

- The employee should fill in their name, date and manager's name on this form.
- Fill in actions, KPI and timeframe sections in the spaces provided.
- Write examples of behaviours demonstrated in the areas provided.
- Have a manager make comments and review the performance plan before finalising.

Manager Performance Evaluation Form:

- The manager should fill in these forms for each employee.
- Fill in employee name, date and manager name.
- Enter comments of performance against KPIs and overall rating of performance against KPIs (refer to company performance management framework or guides).
- Enter comments on performance against behaviour/value expectations in the spaces provided and overall rating (referring to company performance management framework and guides).
- Fill in additional comments space if required.
- Undertake a final review by circling the appropriate row / column cell and rating the employee's performance in the final table.

# Performance Plan – KPI Template

Name:

Date:

Instructions:

The employee should fill in their name, date and manager's name on this form. They should also fill in actions, KPI and timeframe sections in the spaces provided. Please write examples of behaviours demonstrated in the areas provided. Finally, please have your manager make comments and review the performance plan before finalising. When drafting your Individual Objectives, ensure you review the company's strategy and annual plans.

<b>Objective</b> <b>(The outcome you will achieve).</b>		
Actions - (What you need to do)	KPI - (How you will measure success)	Time Frame - (When it will be done)

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# Employee Behavioural Performance Form

Name:

Date:

What We Expect	Examples	Comments
Value / Behaviour 1		
Value / Behaviour 2		
Value / Behaviour 3		
Value / Behaviour 4		
Value / Behaviour 5		
Value / Behaviour 6		

## Performance Evaluation: Manager's Assessment

Name:

Date:

Manager:

Instructions:

The manager should fill in these forms for each employee. Please fill in the employee's name, date and your name. Please enter comments of performance against KPIs and overall rating of performance against KPIs (refer to company performance management framework or guides), and comment on their performance against behaviour/value expectations in the spaces provided and overall rating (referring to company performance management framework and guides). Please fill in additional comments space if required. Lastly, undertake a final review by circling the appropriate row / column cell and rating the employee's performance in the final table.

Performance Against Key Performance Indicators (KPIs):

Assess the employee's performance over the year according to the following criteria:

- The extent to which the employee met or exceeded expectations.
- The extent to which the employee's agreed performance outcomes/goals/indicators were met or exceeded.
- The level of initiative the employee showed in anticipating and responding to the organisation's evolving requirements.
- The extent to which the employee demonstrated an ability to work productively, requiring no more guidance and support than was appropriate to the seniority of their position; and as necessary.
- The extent to which external factors beyond the employee's control impacted their performance (positively or negatively).

<b>KPI</b>	<b>Manager's Comments</b>
KPI 1 (Insert Here)	
KPI 2 (Insert Here)	
KPI 3 (Insert Here)	
KPI 4 (Insert Here)	
KPI 5 (Insert Here)	
KPI 6 (Insert Here)	
Overall Rating of Employee's Performance Against KPIs (refer to Performance Guide):	



## Performance Against Behaviours

Please assess the employee's behaviours (based on the company's values and behavioural expectations). Assess the employee's behavioural standards and achievements over the year according to the following criteria:

- The extent to which the employee was seen as upholding your values (if detailed), or their performance against your expected behaviours (based on your code of conduct, policies or other such items).
- Their day-to-day conduct and interactions with others in the team.
- The extent to which the employee was regarded internally as a role model to others.
- For example, the value may be 'Respect', and the behaviours may include.
- Is willing to reconsider a position if new information warrants it.
- Provides open and honest feedback – lets people know where they stand.
- Creates an open work environment where people can 'speak their minds'.

Behaviour	Your Comments
Behaviour / Value 1	
Behaviour / Value 2	
Behaviour / Value 3	
Behaviour / Value 4	
Behaviour / Value 5	
Overall Rating of Employee's Performance Against Behaviours (Refer to Performance Guide):	

# Manager's Final Assessment

Name:

Date:

Manager:

<b>Ahead of Track - Strong demonstration of most of the attributes</b>	On Track	Ahead of Track	Ahead of Track (Outstanding)
<b>On Track - Demonstrated most of the attributes</b>	Behind Track	On Track	Ahead of Track
<b>Behind Track - Did not sufficiently demonstrate most of the attributes</b>	Behind Track	Behind Track	On Track
	<b>Behind Track - Did not sufficiently meet some of the agreed KPIs</b>	<b>On Track - Broadly met the agreed KPIs</b>	<b>Ahead of Track - Significantly exceeded the agreed KPIs</b>

*Note: The final assessment should use the company's performance management model as required.*