

	<h1>Evaluation Form for Regular Employees</h1> <h2>Forms and Templates</h2>		Document Number: FM-SS-05.09
	Department: Human Resource	Effective Date: September 18, 2018	Revision No 0

 	PERFORMANCE MANAGEMENT SYSTEM FOR REGULAR EMPLOYEES		DOCUMENT NO:	FM-SS-05.09	
			EFFECTIVE DATE:	September 18, 2018	
			REVISION NO:	0	
			DEPARTMENT:	Human Resource	
Surname		First Name	M.I.	Date Hired	Years in Present Position
Position Title		Branch/Department/SBU		Rating Period Covered From: To:	

I. GUIDELINES

The objective of the Performance Management System is to assess employee performance based on the requirements and standards needed to successfully meet and/or exceed performance expectations. The system aims to reflect on What has been achieved and How it was achieved within the period specified.

This form will be completed **semi-annually** for regular employees, by the member's immediate leader. The supervisor may also ask the team member to complete a self-appraisal.

The leader's evaluation finalized with the member, is to be reviewed and signed by the SBU Head. Once the review has been conducted, a copy is given to the employee, a copy retained by the supervisor, and the original sent to Human Resources.

Rating:

- | | | |
|---|---|--|
| 1 | - | Exceeds Expectation |
| 2 | - | Meets Expectation |
| 3 | - | Fair - needs improvement, more is expected |
| 4 | - | Does Not Meet Expectation |

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II. ASSESSMENT OF EMPLOYEE PERFORMANCE

Indicate in the appropriate box the level (performance rating scale) which most accurately describes the employee's performance in each factor. The rating to be indicated shall be based on the leader's balanced and objective judgment based on adequate and appropriate information regarding employee performance, e.g., employee-specific objectives, service level agreements, work habits and attitude, etc.

Furthermore, additional justification of employee performance ratings, i.e., facts, figures and critical incidents – by the superior should be included in the comments part as provided herein. Additional sheets justifying the performance rating can be attached in the PMS.

Remember to rate employee performance based on the period indicated above. Employee performance prior to the period covered should not influence the current rating. Rate each factor independently and encircle the rating that corresponds to the employee's performance.

#	Performance Standards	Weight		Rating	Score	Comments
		For Non - Sales	For Sales			
1	Job Knowledge: The extent to which the incumbent is familiar with policies and procedures applicable to the position and able to work independently.	20%	20%		0	
2	Productivity: The volume of acceptable work produced. Ability to organize and prioritize work; utilize time well and fully meet deadlines.	20%	25%		0	
3	Quality: The ability to complete work accurately and neatly to meet quality standard	20%	20%		0	
4	Customer Service: Refers to all aspects of public contact and the resulting image citizens have of the company and its employees. Does the employee demonstrate tact and diplomacy and does he/she follow-up on customer complaints and questions?	5%	5%		0	
5	Communication: Communication skills, both oral and written, represent an important aspect of organizational effectiveness. Employees are expected to communicate well with fellow employees and the general public in a professional manner, including the application of sound listening skills.	5%	5%		0	
6	Dependability: The reliability of the employee to accept job assignments and to complete them within established deadlines in an effective manner. The employee must be trusted to utilize sound judgment as they perform their tasks.	5%	5%		0	
7	Attendance and Punctuality: The employee's adherence to work schedules, including designated breaks. Use of leave privileges and willingness to work additional hours when required.	10%	5%		0	
8	Adaptability and Resourcefulness: The ability to adjust to change with a minimum of disruption to productivity. Ability to contribute useful ideas for the improved performance of the position.	5%	5%		0	
9	Support to Management: Compliance with company policies: policies and procedures and Code of Conduct (COC).	5%	5%		0	
10	Relationships: The ability to establish and maintain effective relationships with others with whom interaction is required in the performance of the position.	5%	5%		0	
OVERALL PMS RATING		100%	100%		0	

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EVALUATION TABLE					
#	ATTRIBUTES	1 – Exceeds Expectations	2 – Meets Expectations	3 – Fair, needs improvement	4 – Does not Meet Expectations
1	ATTENDANCE AND PUNCTUALITY	Always Early. Excellent record. Consistently present and on time.	Attendance and punctuality are good.	Irregular attendance. Has several questionable absences. Frequently late.	Absent / Late at least 3 times in a month (without a doctor's note).
2	APPEARANCE	Always looks the very best possible. Grooming is always neat and clean.	Grooming generally looks good. Appearance meets our expectations.	Grooming needs improvement. Takes a very little effort in appearance.	Wearing of grooming is poor. No effort at cleanliness or appearance.
3	ATTITUDE	The role model for attitude. Always polite, sincere and helpful. Exceptional enthusiasm at all times.	Accepts Direction & leadership easily and behaves in an acceptable manner.	Has uneven attitude towards direction & leadership. Is impulsive and temperamental.	Antagonistic toward any direction or leadership. Rude and insensitive.
4	INITIATIVE	Self-starter. Takes on/ completes new task on own initiative.	Proceeds with assigned responsibilities.	Requires extra supervision. Concerned with doing only as much as others.	Makes very little effort to get the job done. Waits to be told.
5	QUALITY WORK	Quality/ Quantity of work provided is exceptional. Exceeds our Company standards.	Quality / Quantity of work provided meets our expectations.	Frequently below our standards. Needs double checking and correcting.	Unacceptable. Does not meet our work standards.
6	TEAMWORK (RELATIONSHIP)	Extremely cooperative in working with others. Initiates and promotes teamwork in every area possible.	Maintains good relationship with co-workers. Satisfactory teamwork.	Looks out for own interest before co-workers.	Unwilling to work with or assist others. Fails to cooperate.
7	PRODUCTIVITY	Extremely Productive. Always use idle time to the fullest.	Meet the average goals. Use of idle time wisely.	Below average of goals. Never use the idle time productively.	Not productive at all. Bring the rest of the team down. Waste a lot of time.
8	JOB KNOWLEDGE	Possesses job knowledge that is demonstrated thorough understanding of how to perform regular work assignments	Demonstrates a basic understanding of all job knowledge skills	Requires above average level of supervision on most tasks to be effective. Accepts performance feedback and demonstrates a willingness to apply such information to improving performance.	Frequently requires assistance from supervisor or others in order to complete task due to lack of knowledge of applicable Procedures
9	COMMUNICATION	Communication skill is superior can deal with different kinds of people.	Communication skill is above average can deal with people	Communication skill is low having problem on dealing with people.	Communication skill is very low cannot deal with people.
10	CUSTOMER SERVICE	Deals with client politely and help them with problem solving extensively.	Deals with client politely and giving acceptable problem solving solution.	Below standards on dealing with clients problem and giving advice.	Very low and dealing with clients needs and problem solving.

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FEEDBACK TEMPLATE	
Name	Position
Leader	Date
Guide Questions	Answers
TO BE COMPLETED BY THE EMPLOYEE	
1. What do you believe were your accomplishments during the evaluation period?	
2. Describe your overall satisfaction with your job?	
3. What can the company do to improve your work and to assist you in achieving designated goals?	
EVALUATION COMMENTS	
Record any significant items presented by the employee or supervisor during the evaluation discussion.	
EMPLOYEE REVIEW	
Are there any other comments the employee may wish to make regarding the evaluation or evaluation process?	
FINAL RECOMMENDATION	


I have reviewed this evaluation and discussed the content with my supervisor. My signature means that I have been advised of my performance, and not that I agree or disagree with the evaluation.



Signature	Date Signed	EMPLOYEE'S NAME
Signature	Date Signed	LEADER'S NAME
Signature	Date Signed	SBU HEAD

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 	<h3>COACHING LOG FORM</h3> <h4>(for Non-Sales Regular Employee)</h4>
Coaching Session Details	
Coaching Objective: <input type="checkbox"/> <i>Correct</i> <input type="checkbox"/> <i>Improve</i> <input type="checkbox"/> <i>Maintain</i>	
Behavior Description/Performance Issue: _____ _____ _____ _____ _____	
Other Observations: _____ _____ _____ _____ _____	
Successes/Effective Behaviors: _____ _____ _____ _____ _____	
Opportunities for Development: _____ _____ _____ _____ _____	
Employee's Inputs: _____ _____ _____ _____ _____	
Remarks A. Notes/ Explanations/ Comments as to the assessment: _____ _____ _____ _____ _____	
Coached by: _____ _____ _____ _____ _____	Acknowledge by: _____ _____ _____ _____ _____
NAME/ SIGNATURE OF IMMEDIATE LEADER Date: _____	NAME/ SIGNATURE OF IMMEDIATE LEADER Date: _____

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