Team Member Appraisal

# Name: Date:

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Rating Scale | 1  Does Not Meet Expectations | | 2  Needs Improvement – Still Developing | | 3  Meets Expectations | | 4  Exceeds Expectations | | 5  Outstanding | |
|  | Performance is below what is expected on a regular basis | | Sometimes performs at an acceptable level but not consistent and needs improvement. **OR** New to role and still developing | | Solid performance, always does a good job and what is expected | | High overall performance, regularly goes beyond what is expected | | Consistently exceeds expectations | |
| **IN YOUR WORK WITH US ……...**  **The 5 behaviours below describe what success looks like in your role.**  **Take some time to read through the descriptions and circle the self-rating number that most accurately describes your overall performance in these areas over the last XX months (using the rating scale above).** | | | | | | | | | | |
| 1. Communication and Collaboration  * Communicates clearly and effectively (listening, written and verbal) * Flexible and willing to listen to ideas that are different to your own * Share information in a timely manner | | | | | | | | | | |
| **Self-Rating** | 1 Does Not Meet Expectations | | 2 Needs Improvement/ Still Developing | | 3 Meets Expectations | | 4 Exceeds Expectations | | 5 Outstanding | |
| **Agreed Rating** |  | |  | |  | |  | |  | |
| **Comments** | | | | | | | | | | |
| 1. Service Excellence (internal and external)  * Deliver - doing what you say you will do * Always professional both on phone and in person * Deals with difficult situations constructively * Proactively identifies opportunities to improve and solutions focused | | | | | | | | | | |
| **Self-Rating** | 1 Does Not Meet Expectations | | 2 Needs Improvement/ Still Developing | | 3 Meets Expectations | | 4 Exceeds Expectations | | 5 Outstanding | |
| **Agreed Rating** |  | |  | |  | |  | |  | |
| **Comments** | | | | | | | | | | |
| 1. Resourcefulness/Results  * Shows initiative and effective problem solving * Finds more effective and efficient ways to do what we do * Meets requirements outlined in job description * Proactively identifies bottlenecks (and potential resolutions) | | | | | | | | | | |
| **Self-Rating** | 1 Does Not Meet Expectations | | 2 Needs Improvement/ Still Developing | | 3 Meets Expectations | | 4 Exceeds Expectations | | 5 Outstanding | |
| **Agreed Rating** |  | |  | |  | |  | |  | |
| **Comments** | | | | | | | | | | |
| 1. Teamwork  * Seeks ways to support members of own team * Continuously works as part of the wider practice team * Shares expertise & knowledge with others | | | | | | | | | | |
| **Self-Rating** | 1 Does Not Meet Expectations | | 2 Needs Improvement/ Still Developing | | 3 Meets Expectations | | 4 Exceeds Expectations | | 5 Outstanding | |
| **Agreed Rating** |  | |  | |  | |  | |  | |
| **Comments** | | | | | | | | | | |
| 1. Personal Accountability  * Gets the job done on time * Accurate and avoids errors * Transparency – act as though the world is watching * Ownership – is honest with self, colleagues, and clients | | | | | | | | | | |
| **Self-Rating** | 1 Does Not Meet Expectations | | 2 Needs Improvement/ Still Developing | | 3 Meets Expectations | | 4 Exceeds Expectations | | 5 Outstanding | |
| **Agreed Rating** |  | |  | |  | |  | |  | |
| **Comments** | | | | | | | | | | |
| 1. Insert your own  * xxx * xxx * xxx | | | | | | | | | | |
| **Self-Rating** | | 1 Does Not Meet Expectations | | 2 Needs Improvement/ Still Developing | | 3 Meets Expectations | | 4 Exceeds Expectations | | 5 Outstanding |
| **Agreed Rating** | |  | |  | |  | |  | |  |
| **Comments** | | | | | | | | | | |

**IT’S YOUR FUTURE, WHERE DO YOU WANT TO TAKE IT?**

**If you are happy in your current role that’s great but we always want to give you the opportunity to discuss future development opportunities and ways, we might be able to help get you there.**

**Some questions to get you thinking about your future – feel free to write down some notes so we can discuss further during your review.**

What do you want to be doing in 2 years? In 5 years?

What development do you need to be able to get there?

How can we make sure you don’t get stale or bored in your current role?

Are there any projects you are interested in being involved in?

We agree that we have fully discussed and noted the information and action points

Reviewer (Name & signature): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Team member (Name & signature): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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