

# Annual Employee Evaluation Form

## Employee Information:

- **Name:** \_\_\_\_\_
- **Date of Hire:** \_\_\_\_\_
- **Position:** \_\_\_\_\_
- **Department:** \_\_\_\_\_
- **Evaluator:** \_\_\_\_\_
- **Date of Evaluation:** \_\_\_\_\_

## Performance Evaluation Criteria:

## Rating Scale:

- **Exceeds Expectations:** Consistently performs beyond job requirements.
- **Meets Expectations:** Consistently performs to standard job requirements.
- **Needs Improvement:** Frequently falls short of job requirements; improvement needed.
- **Unsatisfactory:** Consistently fails to meet job requirements.

## 1. Job Knowledge and Skills:

- Understands job duties and responsibilities
  - Exceeds Expectations
  - Meets Expectations
  - Needs Improvement
  - Unsatisfactory
- Demonstrates necessary job skills and knowledge
  - Exceeds Expectations
  - Meets Expectations
  - Needs Improvement
  - Unsatisfactory
- Demonstrates knowledge of and follows company procedures and guidelines
  - Exceeds Expectations
  - Meets Expectations
  - Needs Improvement
  - Unsatisfactory

**Comments:**

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## 2. Quality of Work:

- Produces accurate and thorough work
  - Exceeds Expectations
  - Meets Expectations
  - Needs Improvement
  - Unsatisfactory
- Completes work on time
  - Exceeds Expectations
  - Meets Expectations
  - Needs Improvement
  - Unsatisfactory
- Pays attention to detail
  - Exceeds Expectations
  - Meets Expectations
  - Needs Improvement
  - Unsatisfactory

**Comments:**

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### 3. Communication Skills:

- Communicates effectively with team members
  - Exceeds Expectations
  - Meets Expectations
  - Needs Improvement
  - Unsatisfactory
- Listens to feedback and responds appropriately
  - Exceeds Expectations
  - Meets Expectations
  - Needs Improvement
  - Unsatisfactory
- Clearly conveys information and instructions
  - Exceeds Expectations
  - Meets Expectations
  - Needs Improvement
  - Unsatisfactory

**Comments:**

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### 4. Teamwork and Collaboration:

- Works well with others
  - Exceeds Expectations
  - Meets Expectations
  - Needs Improvement
  - Unsatisfactory
- Contributes to team goals
  - Exceeds Expectations
  - Meets Expectations
  - Needs Improvement
  - Unsatisfactory
- Supports and assists team members
  - Exceeds Expectations
  - Meets Expectations
  - Needs Improvement
  - Unsatisfactory

**Comments:**

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## 5. Initiative and Problem-Solving:

- Takes initiative to improve work processes
  - Exceeds Expectations
  - Meets Expectations
  - Needs Improvement
  - Unsatisfactory
- Identifies and solves problems effectively
  - Exceeds Expectations
  - Meets Expectations
  - Needs Improvement
  - Unsatisfactory
- Demonstrates creativity and innovation
  - Exceeds Expectations
  - Meets Expectations
  - Needs Improvement
  - Unsatisfactory

**Comments:**

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## 6. Dependability and Reliability:

- Meets attendance and punctuality standards
  - Exceeds Expectations
  - Meets Expectations
  - Needs Improvement
  - Unsatisfactory
- Fulfills work commitments consistently
  - Exceeds Expectations
  - Meets Expectations
  - Needs Improvement
  - Unsatisfactory
- Demonstrates reliability and responsibility
  - Exceeds Expectations
  - Meets Expectations
  - Needs Improvement
  - Unsatisfactory

**Comments:**

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**7. Goals and Objectives:**

- Achieved goals set in previous evaluation period
  - Exceeds Expectations
  - Meets Expectations
  - Needs Improvement
  - Unsatisfactory
- Sets realistic and challenging goals
  - Exceeds Expectations
  - Meets Expectations
  - Needs Improvement
  - Unsatisfactory
- Progress towards current goals
  - Exceeds Expectations
  - Meets Expectations
  - Needs Improvement
  - Unsatisfactory

**Comments:**

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**Overall Performance Rating:**

- Exceeds Expectations
- Meets Expectations
- Needs Improvement
- Unsatisfactory

**Evaluator's Summary Comments:**

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**Employee Comments:**

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**Employee Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Evaluator Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

# Goals and Objectives Form - Explanatory Document

**Purpose of the Form:** The Goals and Objectives Form is designed to facilitate a clear and structured approach to setting, tracking, and evaluating employee goals and objectives for the upcoming year. This form is intended to enhance communication between employees and evaluators, ensuring alignment on expectations and performance criteria.

**When setting goals, ensure they follow the SMART criteria:**

- **Specific:** Clearly define the goal.
- **Measurable:** Include criteria to measure progress and success.
- **Achievable:** Ensure the goal is realistic and attainable.
- **Relevant:** Align the goal with broader organizational objectives.
- **Time-bound:** Set a clear deadline for achieving the goal.

**Goals and Objectives for the Upcoming Year:** This section is used to outline specific goals that the employee will aim to achieve during the year. Each goal should be accompanied by related objectives and a measurement of success.

- **Goal:** A clear and specific statement of what the employee aims to achieve.
- **Objective 1, 2, 3:** These are actionable steps or milestones that support the achievement of the goal. Multiple objectives can be listed to provide a detailed plan of action.
- **Measurement of Success:** This is a criterion or set of criteria used to evaluate whether the goal and its objectives have been successfully met. It should be specific, measurable, and relevant to the goal.
- **Target Completion Date:** The expected date by which the goal should be achieved.

**Example:**

- **Goal:** Improve resident satisfaction in the senior living community.
  - **Objective 1:** Conduct a quarterly resident feedback survey.
  - **Objective 2:** Implement at least three new activities based on resident suggestions.
  - **Objective 3:** Train staff on enhanced communication techniques with residents.
  - **Measurement of Success:** Achieve an average resident satisfaction score of 4.5 out of 5 in quarterly surveys.
  - **Target Completion Date:** December 31, 2025.

**Progress Review and Comments:** This section is used to document the progress made towards achieving the goals and objectives. It includes a yearly review to allow for ongoing assessment and feedback.

- **Year-End Review Date:** The date of the year-end review.
- **Goal 1 Progress:** Detailed comments on the progress made towards Goal 1.
- **Goal 2 Progress:** Detailed comments on the progress made towards Goal 2.
- **Goal 3 Progress:** Detailed comments on the progress made towards Goal 3.

**Example:**

- **Goal 1 Progress:** Achieved an average resident satisfaction score of 4.6 in the annual resident satisfaction survey. Completed all planned training sessions for staff.

# Goals and Objectives Form

## Employee Information:

- Name: \_\_\_\_\_
- Date of Hire: \_\_\_\_\_
- Position: \_\_\_\_\_
- Department: \_\_\_\_\_
- Evaluator: \_\_\_\_\_
- Date of Evaluation: \_\_\_\_\_

## Goals and Objectives for the Upcoming Year:

1. Goal: \_\_\_\_\_

- Objective 1: \_\_\_\_\_
- Objective 2: \_\_\_\_\_
- Objective 3: \_\_\_\_\_
- Measurement of Success: \_\_\_\_\_  
\_\_\_\_\_

- Target Completion Date: \_\_\_\_\_

## Comments:

\_\_\_\_\_  
\_\_\_\_\_

2. Goal: \_\_\_\_\_

- Objective 1: \_\_\_\_\_
- Objective 2: \_\_\_\_\_
- Objective 3: \_\_\_\_\_
- Measurement of Success: \_\_\_\_\_  
\_\_\_\_\_

- Target Completion Date: \_\_\_\_\_

## Comments:

\_\_\_\_\_  
\_\_\_\_\_

3. Goal: \_\_\_\_\_

- Objective 1: \_\_\_\_\_



- Objective 2: \_\_\_\_\_
- Objective 3: \_\_\_\_\_
- Measurement of Success:

\_\_\_\_\_

- Target Completion Date: \_\_\_\_\_

**Comments:**

\_\_\_\_\_  
\_\_\_\_\_

**Yearly Review Date:** \_\_\_\_\_

- Goal 1 Progress:

\_\_\_\_\_  
\_\_\_\_\_

- Goal 2 Progress:

\_\_\_\_\_  
\_\_\_\_\_

- Goal 3 Progress:

\_\_\_\_\_  
\_\_\_\_\_

**Comments:**

\_\_\_\_\_  
\_\_\_\_\_

**Signatures:**

**Employee Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Evaluator Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

