

Bachman Machine Company
Clerical Positions Competency Evaluation

NAME: _____ DEPT: _____ EMP. #: _____

APPRAISAL PERIOD: FROM: _____ TO: _____ TYPE: Probationary Annual 6 Month Special

The following is an evaluation regarding the competency, awareness, and training needs for specific employees. Our objective is to use this as a quantitative management tool to assess skill levels and plan for continual improvement through experience and effective training.

On a scale of 1 – 5 (1 = inexperienced; 5 = proficient), rate the following, as applicable.

Skills

- _____ Demonstrates proper use of Phone system
- _____ Demonstrates proper use of Personal Computer
- _____ Understands Computer applications specific to his/her job ie. Word, Excel, E-mail system
- _____ Understands applicable computer software or programs relevant to his/her job
- _____ Understands and interfaces well with Syteline ERP system
- _____ Understands the management system and personnel structure
- _____ Demonstrates good time management and organization skills

Clerical Activities

- _____ Operates all office equipment proficiently, ie. copiers, fax machines, etc.
- _____ Organizes/files all records and documents properly for adequate recall as necessary.
- _____ Communicates information well, with proper clarity and accuracy.

Is this individual aware of how their performance contributes to the achievement of the quality objectives? (See current Company objectives in the quality manual.)

Are there any training recommendations at this time?

Manager's signature & date

Employee's signature & date

Bachman Machine Company Performance Appraisal

INSTRUCTIONS: Using the competencies on the reverse side of this form, rate the employee on the following factors:

PERFORMANCE FACTOR		Appraisal Statement (Check the one most appropriate statement for each Performance Factor) For any unsatisfactory ratings, please provide support documentation.				
Rating Level Definitions	<input type="checkbox"/> Outstanding: <input type="checkbox"/> Very Good: <input type="checkbox"/> Effective: <input type="checkbox"/> Marginal: <input type="checkbox"/> Unsatisfactory:	Performance meets the expected level of performance and exceeds performance levels in most areas, most of the time. Performance meets the expected level of performance and exceeds performance levels in some areas, some of the time. Performance meets the expected level of performance in all areas, all of the time. Performance fails to meet the expected level of performance in one or more areas, some of the time. Performance fails to meet the expected level of performance in most areas, most of the time.				
		Unsatisfactory	Marginal	Effective	Very Good	Outstanding
Job Knowledge: Understanding present job duties & related work		<input type="checkbox"/> Unable to list & describe duties & knows little about related work	<input type="checkbox"/> Able to list & describe minimum requirements of the position. Knowledge should improve with experience	<input type="checkbox"/> Can list & describe job mechanics. Routine instructions given.	<input type="checkbox"/> Has very good knowledge of job & related work. Needs little instruction.	<input type="checkbox"/> Exceptionally well-informed on all phases of work. Rarely needs instruction, even in new situations.
Job Skills: Demonstrated skills & abilities necessary for full job performance		<input type="checkbox"/> Not able to perform job functions despite training / instruction	<input type="checkbox"/> Demonstrates minimal skills & abilities	<input type="checkbox"/> Possesses satisfactory skills & abilities to produce acceptable work.	<input type="checkbox"/> Above average competency in use of necessary skills & abilities	<input type="checkbox"/> Consistently superior use of skills & abilities
Quality of Work: The accuracy, completeness, neatness, & effectiveness of work performed		<input type="checkbox"/> Consistently below minimum standards. Work is unacceptable. Work must often be redone.	<input type="checkbox"/> Usually meets minimum standards however, improvement is needed. Work must be redone occasionally.	<input type="checkbox"/> Produces satisfactory work. Meets all expectations of the position. Work is seldom redone.	<input type="checkbox"/> Frequently exceeds expectations. Does above average work.	<input type="checkbox"/> Consistently exceeds expectations. Does exceptional work.
Judgment: Ability to organize & achieve logical conclusions in a timely manner		<input type="checkbox"/> Makes frequent errors in judgment	<input type="checkbox"/> Judgment adequate in routine situations.	<input type="checkbox"/> Exercises satisfactory judgment in nearly all cases	<input type="checkbox"/> Exercises good judgment & anticipates consequences of actions.	<input type="checkbox"/> Exercises exceptional judgment. Displays maturity in handling most situations.
Dependability: Performance of job duties in the absence of direct or indirect supervision		<input type="checkbox"/> Needs constant direct supervision	<input type="checkbox"/> Needs frequent direct supervision	<input type="checkbox"/> Needs routine indirect supervision	<input type="checkbox"/> Seldom needs direct or indirect supervision	<input type="checkbox"/> Justifies utmost confidence. A self-starter. Needs no supervision.
Adaptability / Flexibility: The ability to successfully alter activities to cope with demands of new situations that require acceptance & support. For example, being open to ideas & suggestions from others.		<input type="checkbox"/> Unable / unwilling to adapt to new situations.	<input type="checkbox"/> Shows immediate resistance & delays transition to change.	<input type="checkbox"/> Accepts the changing situation	<input type="checkbox"/> Embraces change & views it as an opportunity for positive improvement.	<input type="checkbox"/> Initiates & promotes positive change
Initiative: Resourcefulness, self-reliance, willingness to accept & ability carry out responsibility		<input type="checkbox"/> Needs detailed instructions. Rarely develops more effective ways of handling assignments. Requires constant follow-up	<input type="checkbox"/> Demonstrates minimal initiative. Seldom exhibits creative thought. Requires some follow-up.	<input type="checkbox"/> Takes initiative to solve problems & carry out responsibility	<input type="checkbox"/> Has drive & resourcefulness to deviate from routines & make effective suggestions.	<input type="checkbox"/> Frequently makes ingenious suggestions, develops ideas & solutions to problems & follows through completely.
Communication Skills: Ability to communicate with others orally and/or writing		<input type="checkbox"/> Written <input type="checkbox"/> Spoken Frequently unable to communicate clearly	<input type="checkbox"/> Written <input type="checkbox"/> Spoken Occasionally unable to communicate clearly	<input type="checkbox"/> Written <input type="checkbox"/> Spoken Possesses appropriate communication skills for position	<input type="checkbox"/> Written <input type="checkbox"/> Spoken Better than average ability to communicate thoughts & ideas.	<input type="checkbox"/> Written <input type="checkbox"/> Spoken Exceptional communication skills.
Attendance: Attendance and punctuality		<input type="checkbox"/> Often absent &/or frequently tardy without good excuse	<input type="checkbox"/> Lax in attendance or reporting on time.	<input type="checkbox"/> Attendance & punctuality are satisfactory.	<input type="checkbox"/> Rarely absent or tardy.	<input type="checkbox"/> Extremely conscientious. Absent only when unavoidable.
Relationship with People: Works harmoniously & effectively with others		<input type="checkbox"/> Has difficulty relating to others, which frequently inhibits effectiveness	<input type="checkbox"/> Relates fairly well to others, works with some better than others.	<input type="checkbox"/> Works well with others, which promotes effectiveness in carrying out duties.	<input type="checkbox"/> Gets along extremely well with others.	<input type="checkbox"/> Demonstrates outstanding interpersonal skills & abilities, which are assets on the job.
OVERALL PERFORMANCE EVALUATION						
OVERALL RATING:	<input type="checkbox"/> Outstanding: <input type="checkbox"/> Very Good: <input type="checkbox"/> Effective: <input type="checkbox"/> Marginal: <input type="checkbox"/> Unsatisfactory:	Employee exceeds the expected level of performance in most Performance Factors, most of the time. Employee exceeds the expected level of performance in some Performance Factors, some of the time. Employee meets the expected level of performance in all Performance Factors, all of the time. Employee fails to meet the expected level of performance in one or more Performance Factors, some of the time. Employee fails to meet the expected level of performance in most Performance Factors, most of the time.				