

Performance appraisal form template

org /division/dept:		Location/based at:		
Name: [REDACTED]	Position: personal assistant		Ref:	
		Year of	Time i	Length of service: 5yrs
Appraisal date & time:	Appraisal venue:		Appr	07/11/15

Part An Appraisee to complete before the interview and return to the appraiser by (date)

A1 State your understanding of your main duties and responsibilities.

My duties as a personal assistant includes assisting my boss in personal tasks such as food, preparation and service, running errands, household duties, as well as business assistance which may include administrative work, schedule preparation, emails, phone calls and travel arrangements

A2 Discussion points:

1. Has the past year been good/bad/satisfactory or otherwise for you, and why?

Past year has been good and productive in my academic and professional persuasions, however, were limited in my position as a personal assistant

2. What do you consider to be your most important achievements of the past year?

- Essential improvements in my speaking and writing
- Driver licence
- Computer typing
- My first internship job where I obtained professional skills such as marketing and administrative

3. What do you like and dislike about working for this organisation? I value this job for allowing me to feel as a part of a family in which each task is made not in the notion of "I have to " do but "I want to "do it. My close relationship and respect for a person I work for makes me willing to help and please my boss on the given tasks beyond the scope of a formal terms and conditions. I value this job for allowing me to grow personally, as well as professionally , as a core result of my boss' s advice and support. I like this job for flexibility and allowance to obtain my school degree. In addition, I like this job for allowing me to travel, with my boss, meet amazing and interesting people, who I would not have an opportunity to meet in person in any other occupations and/or organizations.

4. What elements of your job do you find most difficult?

Not meeting high expectations for me often caused by own wrong decisions

5. What elements of your job interest you the most, and least?

Being in highly intellectually rich environment and successful people /guests especially those who associated with my career path nourish my passion and motivation for achievements in my field. Ability to talk and ask questions and advice from famous politicians and entrepreneurs

6. What do you consider to be your most important aims and tasks in the next year?

- To meet my boss expectations that I haven't accomplished
- To be more helpful than I was the past year
- Not to replace but rather to aid in tasks that used to do my boss personal assistant (Sarah)

7. What action could be taken to improve your performance in your current position by you, and your boss?

Most of my improvements are fully dependant on me; my boss always supports and provides me with a needed environment for my improvements.

- Improving my public speaking skills
- Time management
- Multitasking

8. What kind of work or job would you like to be doing in one/two/five year's time?

Working in diplomacy and international affairs either for a large INGO or the UN

9. What sort of training/experiences would benefit you in the next year? Not just job-skills - also your natural strengths and personal passions you'd like to develop - you and your work can benefit from these.

- Time management and time efficiency
- Self-confidence
- Strong voice/public speaking
- Better analysing before making decisions or taking actions

A3 List the objectives you set out to achieve in the past 12 months (or the period covered by this appraisal) with the measures or standards agreed - against each comment on achievement or otherwise, with reasons where appropriate. Score the performance against each objective (1-3 = poor, 4-6 = satisfactory, 7-9 = good, 10 = excellent):

Objective	measure/standard	score
- To resolve issue with my documents	looking for partner and other available options	
- Be more helpful and satisfy needs of my boss	be more at the house and offering My assistance	3
- To do well in school	to prioritize my academic life over personal	8
- Professional experience/ internship	placing my resume, asking people, Applying to organizations / interviews	9
- Learning to drive a car	going to driving school, taken exams	9
-Writing skills	readings, writing classes, academic papers	9
- Public speaking	taken special classes, sessions within and outside Of school	3
- Time management. & Efficiency	planning my schedule and setting deadlines For tasks, trying not to be late for my meetings	3
- Multitasking	increasing and deferring my objectives (School/internship)	6
-Manage my personal life/relationship	dating websites, attending to events	3

A4 Score your own capability or knowledge in the following areas in terms of your current role requirements (1-3 = poor, 4-6 = satisfactory, 7-9 = good, 10 = excellent). If appropriate bring evidence with you to the appraisal to support your assessment. The second section can be used if working towards new role

1. Commercial judgement	7	Others (for current or new role):		
2. Product/technical knowledge	6		18. Corporate responsibility and ethics	7
3. Time management	3			
4. Planning, budgeting and forecasting	6			
5. Reporting and administration	3			
6. Communication skills	6			
7. Delegation skills	3			
8. IT/equipment/machinery skills	6			
9. Meeting deadlines/commitments	3			
10. Creativity	6			
11. Problem-solving and decision-making	4			
12. Team-working and developing others	4			
13. Energy, determination and work-rate	7			
14. Steadiness under pressure	5			
15. Leadership and integrity	3			
16. Adaptability, flexibility, and mobility	4			
17. Personal appearance and image	4			

A5 In light of your current capabilities, your performance against past objectives, and your future personal growth and/or job aspirations, what activities and tasks would you like to focus on during the next year. Again, also think of development and experiences outside of job skills - related to personal aims, fulfilment, and passions.

- Time management/ meeting deadlines
- Work efficiency
- Multitasking
- Public speaking
- Delegation skills/ leadership skills / self- confidence
- Learn new languages (Chinese / French)
- Problem solving/decision making

- Personal and professional appearance / image

- Documents

- Job related to my field (the UN or INGOs)

Part B To be completed during the appraisal by the appraiser - where appropriate and safe to do so, certain items can be completed by the appraiser before the appraisal, and then discussed and validated or amended in discussion with the appraisee during the appraisal.

B1 Describe the purpose of the appraisee's job. **Discuss and compare with self-appraisal entry in A1. Clarify job purpose and priorities where necessary.**

B2 Review the completed discussion points in A2, and note the points of and action.

B3 List the objectives that the appraisee set out to achieve in the past 12 months (or the period covered by this appraisal - typically these objectives will have been carried forward from the previous appraisal record) with the measures or standards agreed - against each comment on achievement or otherwise, with reasons where appropriate. Score the performance against each objective (1-3 = poor, 4-6 = satisfactory, 7-9 = good, 10 = excellent). **Compare with the self-appraisal in A3. Discuss and note points of significance, particularly training and development needs and wishes, which should be noted in B6.**

Objective	measure/standard	self-score/app'r score	comment
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B4 Score the appraisee's capability or knowledge in the following areas in terms of their current (and if applicable, next) role requirements (1-3 = poor, 4-6 = satisfactory, 7-9 = good, 10 = excellent). If appropriate provide evidence to support your assessment. The second section can be used for other criteria or if the appraisee is working towards new role requirements. **Compare scores with the self-appraisal in B4. Discuss and note agreed points training/development needs and wishes (to B6).**

1. Commercial judgement			Others (for current or new role):			
2. Product/technical knowledge				18. Corporate responsibility and ethics		
3. Time management						
4. Planning, budgeting and forecasting						
5. Reporting and administration						
6. Communication skills						
7. Delegation skills						
8. IT/equipment/machinery skills						
9. Meeting deadlines/commitments						
10. Creativity						
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13. Energy, determination and work-rate						
14. Steadiness under pressure						
15. Leadership and integrity						
16. Adaptability, flexibility, and mobility						
17. Personal appearance and image						

B5 Discuss and agree the appraisee's career direction options and wishes, and readiness for promotion, **and compare with and discuss the self-appraisal entry in A5.** (Some people do not wish for promotion, but everyone is capable of, and generally benefits from, personal development - development and growth should be available to all, not just people seeking promotion). **Note the agreed development aim(s):**

B6 DISCUSS and agree the skills, capabilities and experience required for competence in current role, and if appropriate, for readiness to progress to the next role or roles. **Refer to actions arising from B3 and the skill-set in B4, in order to accurately identify all development areas, whether for competence at current level or readiness to progress to next job level/type.) Note the agreed development areas:**

B7 Discuss and agree the specific objectives that will enable the **appraisee to reach competence and to meet required performance in current job**, if appropriate taking account of the coming year's plans, budgets, targets etc., and that will enable the appraisee **to move towards, or achieve readiness for, the next job level/type, or if no particular next role is identified or sought, to achieve the desired personal growth or experience.** These objectives must adhere to the SMARTER rules - specific, measurable, agreed, realistic, time-bound, ethical, recorded.

B8 Discuss and agree (as far as is possible, given budgetary, availability and authorisation considerations) the training and development support to be given to help the appraisee meet the agreed objectives above.

Refer to the [guidance notes](#). Personal development and support must be offered to all employees, irrespective of age, gender, race, disability, etc., and not just to those seeking promotion. Development is not restricted to job skills - it includes 'whole person'. Use your imagination. Job skills training isn't restricted to courses. Think about coaching, mentoring (by and of the appraisee), secondment to another role, holiday job cover, shadowing, distance-learning, e-learning, books, videos, attending meetings and workshops, workbooks, manuals and guides, researching, giving presentations; anything relevant, helpful and agreed to help the person develop. Avoid committing to training expenditure before suitable approval or availability has been confirmed. Understand development options and procedures before conducting the appraisal. Develop the whole person.

B9 Other issues (to be covered separately outside of this appraisal - continue on a separate sheet if necessary):

Signed and dated by appraisee: and by appraiser:

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