

LEARNING AND DEVELOPMENT CONSULTANT PERFORMANCE APPRAISAL

Employee:	Position:	Department:
Appraiser:	Appraisal Period:	Date:

This form should be used to document agreed upon performance objectives and competencies, to measure progress-to-date, and to evaluate annual performance level.

PART I: PERFORMANCE OBJECTIVES

The performance objectives for this position are listed below. For each objective define the standards for performance and indicate the weight assigned. (Remember that performance on the competencies is weighted 30%) Space has been provided for additional objectives if needed.

Objective #1:
Identify the regions' training and development needs and priorities. Weight:

Accountabilities	Performance Standards
Determine staff performance issues and priorities	
Determine adequacy of existing programs	
Identify new programs and interventions needed	
Develop plan for implementing programs	
Finalize plan with HR Directors	
Publish calendar for programs and events	

Objective #2:
Develop or secure training programs and other solutions to meet the regions' need Weight:

Accountabilities	Performance Standards
Develop or source training and other programs to meet the regions needs	
Complete make/buy assessments to ensure cost effectiveness	
Manage development process to meet requirements	
Evaluate new delivery methodologies	

Objective #3:
Deliver training and other performance solutions

Weight:

Accountabilities	Performance Standards
Ensure that programs delivered meet standards	
Evaluate the effectiveness of each program deliverer; identify improvement opportunities	
Evaluate the effectiveness of each program; improve quality of program	

Objective #4:
Develop or secure and implement OD solutions that address region needs.

Weight:

Accountabilities	Performance Standards
Conduct assessments to diagnose needs	
Develop/secure needed interventions	
Reach agreement on priorities for interventions	
Ensure each intervention meets regions' needs; evaluate and improve effectiveness	

Objective #5:
Special Projects/Other

Weight:

Accountabilities	Performance Standards

PART II: PERFORMANCE RESULTS

In the space provided, describe how each performance objective was met. Discuss how the performance affected the department and/or company; extenuating circumstances that either helped or hindered the attainment of objectives; and specific areas where improvement is needed. Record the final performance rating for each objective where indicated.

Rating	Performance Rating Definition
5 – Outstanding Performance	Performance consistently and reliably exceeds all expectations.
4 – Strong Performance	Performance consistently and reliably meets all and exceeds most expectations.
3– Good Performance	Performance consistently and reliably meets all expectations.
2 – Marginal Performance	Performance consistently and reliably meets some expectations.
1– Poor Performance	Performance does not meet expectations.

Objective #1:
Identify the regions’ training and development needs and priorities.

Progress-to-Date	Final Performance Rating
Progress-to-Date:	Final Assessment:
	Final Performance Rating:

Objective #2:
Develop or secure training programs and other solutions to meet the regions’ needs

Progress-to-Date	Final Performance Rating
Progress-to-Date:	Final Assessment:
	Final Performance Rating:

Objective #3:
Deliver training and other performance solutions.

Progress-to-Date	Final Performance Rating
Progress-to-Date:	Final Assessment:
	Final Performance Rating:

Objective #4:
Develop or secure and implement OD solutions that address region needs.

Progress-to-Date	Final Performance Rating
Progress-to-Date:	Final Assessment:
	Final Performance Rating:

Objective #5:
Special Projects/Other

Progress-to-Date	Final Performance Rating
Progress-to-Date:	Final Assessment:
	Final Performance Rating:

PART III: COMPETENCIES

Each competency listed below has three defined performance levels. Record the rating that best describes behaviorally the performance demonstrated during the appraisal period and provide specific examples to support the rating.

Managing Change		
Improvement Opportunity <ul style="list-style-type: none"> ◆ Generally supportive of change ◆ Explains changes to those affected ◆ Generally supportive of other's change ideas 	Demonstrates Proficiency <ul style="list-style-type: none"> ◆ Promotes advantages of change ◆ Helps groups manage the anxiety associated with change ◆ Proposes change and new ideas 	Strength Area <ul style="list-style-type: none"> ◆ Builds commitment for new ideas ◆ Facilitates teams in developing and implementing changes and improvements ◆ Champions and encourages change
Rating:		
Examples:		

Influencing Others		
Improvement Opportunity <ul style="list-style-type: none"> ◆ Appeals to reason ◆ Uses available data to persuade ◆ Uses concrete examples to make a point ◆ Usually attentive to others during presentations 	Demonstrates Proficiency <ul style="list-style-type: none"> ◆ Adapts arguments to appeal the needs and interest of others ◆ Uses the process of give and take to gain support ◆ Notices and accurately interprets what others are feeling 	Strength Area <ul style="list-style-type: none"> ◆ Continually presents win-win solutions which win the support of others ◆ Builds behind the scenes support for initiatives ◆ Anticipates the impact of ones ideas on the emotions and concerns of others ◆ Gains support by capitalizing on understanding of political forces affecting the organization
Rating:		
Examples:		

Building Collaborative Relationships		
Improvement Opportunity <ul style="list-style-type: none"> ◆ Understands the need build relationships and tries ◆ Treats peoples equally and fairly ◆ Usually willing to listen to others 	Demonstrates Proficiency <ul style="list-style-type: none"> ◆ Takes an interest in others and uses to build relationships with people whose support is needed ◆ Builds rapport with key people ◆ Understands and respects others perspectives 	Strength Area <ul style="list-style-type: none"> ◆ Highly successful in building relationships at all levels in the region; makes people feel valued ◆ Maintains rapport and trust even under difficult situations ◆ Understands the unspoken meaning in a situation and anticipates how others will react
Rating:		
Examples:		

Diagnostic Information Gathering		
Improvement Opportunity <ul style="list-style-type: none"> ◆ Considers available information ◆ May seek others input ◆ Usually draws logical conclusions 	Demonstrates Proficiency <ul style="list-style-type: none"> ◆ Recognizes what information is needed in a situation and seeks it out ◆ Seeks out others perspectives on the issue ◆ Distinguishes between relevant and irrelevant information 	Strength Area <ul style="list-style-type: none"> ◆ Gathers needed information, even from those reluctant to provide it. ◆ Integrates information from diverse sources; identifies connections that are not obviously related ◆ Sees the broader implications of issues
Rating:		
Examples:		

Forward Thinking		
Improvement Opportunity <ul style="list-style-type: none"> ◆ Considers the potential impact of actions to be taken ◆ Recognizes obvious potential problems and considers alternative actions 	Demonstrates Proficiency <ul style="list-style-type: none"> ◆ Considers possible problems and develops contingency plans in advance ◆ Anticipates consequences of situations and plans accordingly 	Strength Area <ul style="list-style-type: none"> ◆ Anticipates how individuals and groups will react to situations and plans accordingly ◆ Foresees obstacles and opportunities for the region and acts accordingly
Rating:		
Examples:		

Results Orientation		
Improvement Opportunity <ul style="list-style-type: none"> ◆ Sets basic goals ◆ Usually focused on meeting goals; distracted occasionally ◆ May take action without being asked 	Demonstrates Proficiency <ul style="list-style-type: none"> ◆ Sets clear and realistic goals ◆ Does what he/she says he will do ◆ Takes action before being asked or required to 	Strength Area <ul style="list-style-type: none"> ◆ Consistently sets and meets challenging but realistic goals ◆ Continually displays a strong sense of urgency about getting work done and meeting goals ◆ Constantly tracks and monitors results and quickly takes action when needed; encourages others to do the same
Rating:		
Examples:		

Adaptability		
Improvement Opportunity <ul style="list-style-type: none"> ◆ At times will consider others ideas ◆ Able to adjust to changes ◆ Slow to react when current approach is not working ◆ Prefers handling only one or two things at a time. 	Demonstrates Proficiency <ul style="list-style-type: none"> ◆ Open to alternative solutions, sees the merit of others ideas ◆ Easily absorbs and implements changes ◆ Sees what's working and what needs to be changed ◆ Can handle multiple projects 	Strength Area <ul style="list-style-type: none"> ◆ Often champions others ideas for new ways of doing things ◆ Excels at trying new and unconventional ideas ◆ Quick to change direction when the current one isn't working ◆ Thrives on multi-taking; helps others cope
Rating:		
Examples:		

COMPETENCY SUMMARY

	Competency	Rating		
		Imp. Opp. 1	Demon. Prof. 3	Strength Area 5
Influencing Cluster	Managing Change			
	Influencing			
	Building Collaborative Relationships			
Problem Solving Cluster	Diagnostic Information Gathering			
	Forward Thinking			
Achieving Cluster	Results Orientation			
	Adaptability			

Overall Rating	1	2	3	4	5
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Record the rating for each competency in the table above. The three named ratings have now been assigned numerical values of 5, 3 and 1 as shown in the table above. Based on the overall performance on all the competencies, using the 5-point rating scale shown on page 3, circle an overall number rating for the competencies

PART IV: OVERALL PERFORMANCE RATING

Record the final performance rating and weight for each objective and calculate the weighted rating. Determine and record the Overall Performance Rating to indicate the level at which the individual performed during the entire appraisal period. Add comments to support the rating.

Objective	Final Performance Rating	Weight	Weighted Rating
#1: Identify Region Needs			
#2: Develop/Secure Programs			
#3: Deliver Training Programs			
#4: Develop & Implement OD Programs			
#5: Special Projects/Other			
Competencies		30%	
Overall Performance Rating:			
Comments			

PART V: DEVELOPMENT REVIEW

Based on the ratings assigned in the sections above, determine the strengths and areas for growth

Strengths—What things were done very well during this appraisal period (give examples). Consider both the performance objectives and the competencies. How can the strengths be used to maximize advantage in the future?

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Areas for Growth—Give specific examples. What development goals should the individual work toward? (Use the Individual Development Plan to document action plan).

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SIGNATURES

Employee	Date	Appraiser	Date
Next Higher Level Manager	Date	Human Resources Department	Date

Employee Comments:

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