### <COMPANY NAME>

### Sample Estimator Performance Appraisal

NAME\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_JOB TITLE

EVALUATION PERIOD FROM:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_TO:

SUPERVISOR\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_DEPT

HIRE DATE\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_DATE OF APPRAISAL

LENGTH OF TIME IN CURRENT POSITION

The immediate supervisor’s evaluation of performance and administration of salary increases are to follow the procedures as listed below:

1. Appraise the employee’s performance within their position in terms of:

A. Impact of the job function on the overall position;

B. The level of difficulty or challenge of the job function; and,

C. The degree of accomplishment.

2. Evaluate the employee’s performance against each specific objective outlined in the performance appraisal document.

3. Discuss thoroughly with the employee all phases of evaluation, i.e. all notations for discussion purposes.

4. Sign and have the employee sign the performance appraisal form.

5. Give the employee their copy of the signed performance objectives.

6. Submit original performance appraisal to Human Resources.

## RATING EXPLANATION OF RATING

1. Far Exceeds Requirements: Performance consistently and significantly exceeds requirements

in all aspects of job responsibility. Unusually valuable employee. Performance level

acknowledged by all Company.

1. Exceeds Requirements: Significant and clearly identifiable contributions to Company success.

Overall performs many tasks well above acceptable standards. Employee works individually

with little or no direction.

3. Meets Requirements: Performance consistently meets and may occasionally exceed requirements. Dependable and competent performance of job functions. May require little or no supervision.

1. Below Requirements: Performance which does not produce the expected results and not

clearly good enough to warrant recognition or greater responsibility. Performance

needs to improve to consistently meet requirements.

1. Does Not Meet Requirements: Unacceptable performance calling for immediate and

substantial improvement. A performance plan should be developed and implemented.

Inexperienced employees who will move up in a relatively short time.

SPECIFIC OBJECTIVE: COMPETENCE RATING \_\_\_\_\_\_\_\_

The employee’s ability to understand and apply the skills necessary to effectively perform their assigned job. This includes, but is not limited to, specific knowledge of job duties, procedures and work flow, methods, and equipment.

Specifically consider:

* Level of product/system knowledge
* Ability to understand all components of a project

Specific Comments To Support Rating

SPECIFIC OBJECTIVE: QUALITY RATING \_\_\_\_\_\_\_\_

The extent to which the employee completes tasks and assignments in terms of thoroughness, precision, accuracy, and neatness. This factor should consider the amount of work required, the cost to correct any errors, and if the work is completed on time.

Specifically consider:

* Ability to complete a thorough and accurate Bill of Materials
* Ability to properly survey customer job site
* Ability to complete accurate job files for Operations

Specific Comments To Support Rating

SPECIFIC OBJECTIVE: QUANTITY RATING \_\_\_\_\_\_\_\_

The volume of work performed under normal conditions, in relation to, expectations of the job. This includes demonstrated results regarding the amount of work and or effectiveness in meeting deadlines, schedules and assignments.

Specifically consider:

* Ability to efficiently manage multiple projects
* Ability to provide Bill of Materials in a timely manner

Specific Comments To Support Rating

SPECIFIC OBJECTIVE: COORDINATION RATING \_\_\_\_\_\_\_\_

The employee’s ability to act in unity with and support other members of the **<COMPANY NAME>** team. This includes, but is not limited to working well with supervisors, peers, members of other departments, and customers.

Specifically consider:

* Ability to interact effectively with vital departments (sales, operations, admin, etc)
* Ability to work with Purchasing to obtain most competitive pricing for products
* Ability to assist with project walk-throughs

Specific Comments To Support Rating

SPECIFIC OBJECTIVE: CUSTOMER FOCUS RATING \_\_\_\_\_\_\_\_

The employee’s ability to keep the customers, both internal as well as external, at the forefront of every action and decision.

Specifically consider:

* Ability to understand internal/external customers’ needs
* Proactive approach toward providing customer solutions

Specific Comments To Support Rating

SPECIFIC OBJECTIVE: COMMUNICATION RATING \_\_\_\_\_\_\_\_

The employee’s ability to convey integrity, competence and responsiveness through appearance, action, and conduct. This factor involves the ability to listen, develop and express ideas both verbally and in writing.

Specifically consider:

* Presentation skills
* Ability to generate clear and concise estimates
* Ability to effectively generate project description and scope of work

Specific Comment To Support Rating

OVERALL RATING (rounded to whole number) RATING \_\_\_\_\_\_\_\_

Specific comments to support rating:

PREVIOUS PERFORMANCE OBJECTIVES:

OBJECTIVE DUE DATE COMPLETED?

WHAT OBJECTIVES OR ACTIONS HAVE BEEN ESTABLISHED FOR THE NEXT REVIEW PERIOD?

OBJECTIVE DUE DATE

SUPERVISOR COMMENTS:

EMPLOYEE COMMENTS:

The signature of the employee on the evaluation form is an indication that the evaluation has been discussed.

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Employee Signature Date

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Supervisor Signature Date

Original to Human Resources Copy to Employee