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Appraisal Ratings Worksheet Instructions

1. ### Individual Performance Factors - IPFs

   There are 12 individual performance factors within the Talent Appraisal Form. A rating must be assigned to each factor based on the performance of the employee. Once the ratings have been entered in the appropriate rows, select "F9" to calculate totals.

Individual Performance Factors (IPFs)		Mgr./Supv. Performance Factors (MSPFs)		
Factor	Rating	Factor		Rating
Quality of Work	0	Accountability		0
Quantity of Work	0	Administration		0
Individual Effectiveness	0	Collaboration		0
Communications	0	Communication		0
Service Focus	0	Customer Service/Focus		0
Judgement & Decisions	0	Cultural Competence		0
Team Work	0	Performance Drivers		0
Job Knowledge	0	People Centeredness		0
Initiative	0	Training		0
Ongoing Skills Improvement	0			0
Dependability	0			0
Attendance/Punctuality	0			0
Sub-Total of 12 IPF's →	0	*Sub-Total of 9 MSPFs* →		0

   Insert a rating for each of the factors. Select "F9" function key to update totals.
   You must select "F9" function key to update totals to include number in calculations if using WORD ratings format. Excel worksheet also available.

   ### Manager/Supervisor Performance Factors - MSPFs

   There are nine managerial/supervisory performance factors. If the employee is responsible for managing or supervising others, please complete this section. A rating must be assigned to each performance factor based on the performance of the employee. Once the ratings have been entered in the appropriate rows, select "F9" to calculate totals.

Individual Performance Factors (IPFs)		Mgr./Supv. Performance Factors (MSPFs)		
Factor	Rating	Factor		Rating
Quality of Work	0	Accountability		0
Quantity of Work	0	Administration		0
Individual Effectiveness	0	Collaboration		0
Communications	0	Communication		0
Service Focus	0	Customer Service/Focus		0
Judgement & Decisions	0	Cultural Competence		0
Team Work	0	Performance Drivers		0
Job Knowledge	0	People Centeredness		0
Initiative	0	Training		0
Ongoing Skills Improvement	0			0
Dependability	0			0
Attendance/Punctuality	0			0
Sub-Total of 12 IPF's →	0	*Sub-Total of 9 MSPFs* →		0

Insert a rating for each of the factors. Select "F9" function key to update totals.
You must select "F9" function key to update totals to include number in calculations if using WORD form. Excel worksheet also available.

2. Operational Objectives – Optional

Indicate the status of discussed ratings - (A – Achieved or NA – Not Achieved)

Operational Objectives (Optional)	
Please assign rating of (A - Achieved) or (NA - Not Achieved) - if applicable	
Objective	Rating
I.	
II.	
III.	
Overall Operational Objectives Rating →	

3. Overall Performance Rating and Score

Operational Objectives (Optional)		Overall Score	A	B
Objective	Rating	Factors (A)	No. of Factors & Objectives (if applicable)	Section Ratings
I		Individual Performance Factors	0	0
II		Managerial/Supervisory Factors	0	0
III		Operational Objectives (optional)		
IV		Totals	0	0
V				
Total number of objectives ( ) (Insert # of objectives in this area)	0	Overall Score (B)/(A) (Select overall rating below)		

Insert overall rating for each of the factors from IPFs and MSPFs (if applicable). Select "F9" function key to update totals. You must select "F9" function key each time to include numbers in calculations. The overall score will calculate based on numbers that have been inserted in totals area. (if using the WORD Ratings Form) -Excel Worksheet also available.

Total Number of Factors (A) and Total Rating of Factors (B)

There are 12 individual performance factors. Insert the number of factors - 12 under the heading "number of factors". In the next column, "Total Factor Rating", insert the rating for the individual performance factors as calculated in the top portion of the worksheet.

If the individual you are rating is a manager or supervisor, there are 9 performance factors; insert the number of factors - 9 under the heading "number of factors". In the next column, "Total Factor Rating", insert the rating for the individual performance factors as calculated in the top portion of the worksheet.

If the employee is not a supervisor, the total number of factors (A) will be 12. If the employee is a supervisor, the total number of factors (A) will be 21. The total rating of factors (B) will be calculated based on ratings inserted from top portion of worksheet.

Operational Objectives

Enter the total number of operational objectives, if applicable, in the appropriate area. Assign a rating of (A – Achieved or NA – Not Achieved) if applicable in the appropriate rating area.

The worksheet will calculate the overall rating of the employee based on given ratings.