

## **Performance and Coaching Discussion Form**

Employee:  
Job Title:  
Department:

Supervisor:  
Job Title:

For period beginning

To

### **Part I – Instructions**

Once completed, this form is used as the basis for performance coaching discussions. employees and managers Evaluating and discussing job performance in a non-biased way is

### **Relevant duties and responsibilities**

The form lists the criteria, competencies, and job performance factors that are to be necessary for the success of personal, departmental, and company goals. The criteria listed in this evaluation should accurately reflect the employee's overall performance as it relates to the duties/expectations set forth in the job description.

Numeric ratings in each section of this form will be made with the framework/scale below. Additional comments, thoughts, and observations are an important element in the evaluation process and fully inform performance coaching discussions.

|   |                    |   |
|---|--------------------|---|
| 1 | Unsatisfactory     | Consistently fails to meet job duties and expectations; performs at a level demonstrably below corporate requirements; improvement required immediately to maintain employment. |
| 2 | Needs Improvement  | Performance of assigned tasks below expected standard. Some lapses could potentially have affected the safety of visitors and patrons.  |
| 3 | Meets Expectations | Performs job duties at a satisfactory level according to job description under normal supervision and direction   |
| 4 | Above Expectations | Sometimes performs above expectations and thoughtfully resolves emerging issues without compromising safety protocols   |
| 5 | Exceptional        | Often exceeds job requirements; consistently meets goals and objectives; accomplishments occasionally made in areas outside normal job role                                     |

## Part II – Job Criteria

### Abilities, Knowledge, and Skills

The degree to which the employee exhibits the knowledge and skills required to fulfill job duties, as well as the techniques and tools used to do so.

#### Self-rating:

|   |   |   |   |   |
|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|

#### Comments:

#### Supervisor rating:

|   |   |   |   |   |
|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|

#### Comments:

### Quality of Work

Does the employee complete his or her work with the expected degree of quality? Is the employee attentive to detail? Does the employee actively seek out and correct quality-control issues? Take into account accuracy of work, neatness, and adherence to standards.

#### Self-rating:

|   |   |   |   |   |
|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|

#### Comments:

#### Supervisor rating:

|   |   |   |   |   |
|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|

#### Comments:

**Quantity of Work**

Does the employee complete his or her fair share of the assigned workload? Are deadlines met consistently? Also consider how well the employee manages time and how well he or she manages simultaneous or conflicting priorities.

**Self-rating:**

|   |   |   |   |   |
|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|

**Comments:****Supervisor rating:**

|   |   |   |   |   |
|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|

**Comments:****Attitude**

Does the employee display a positive and cooperative attitude about the job role, assigned work, and the organization? Are working relationships built and maintained by this employee?

**Self-rating:**

|   |   |   |   |   |
|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|

**Comments:****Supervisor rating:**

|   |   |   |   |   |
|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|

**Comments:**

**Communication Skills**

Does the employee communicate clearly and effectively within the role? Does the employee clearly express themselves both orally and in writing? Does the employee listen well and respond appropriately? Are written and verbal reports clear and accurate?

**Self-rating:**

|   |   |   |   |   |
|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|

**Comments:****Supervisor rating:**

|   |   |   |   |   |
|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|

**Comments:**

### Part III – Behavioural Characteristics

#### Cooperation

Does the employee work well with peers and supervisors? Does the employee willingly contribute to the success of the team or department? Does the employee exhibit consideration for others and a willingness to help and maintain a rapport with co-workers?

#### Self-rating:

|   |   |   |   |   |
|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|

#### Comments:

#### Supervisor rating:

|   |   |   |   |   |
|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|

#### Comments:

#### Reliability

Does the employee follow through on commitments and job duties consistently? Does the employee accept accountability for his or her work? Does the employee properly follow instructions, directives, and procedures?

#### Self-rating:

|   |   |   |   |   |
|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|

#### Comments:

#### Supervisor rating:

|   |   |   |   |   |
|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|

#### Comments:

**Initiative**

Does the employee actively seek out and assume additional responsibilities without being asked to do so? Does the employee demonstrate an ability to encourage and/or inspire others? Does the employee recognize and act upon new opportunities?

**Self-rating:**

|   |   |   |   |   |
|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|

**Comments****Supervisor rating:**

|   |   |   |   |   |
|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|

**Comments:****Comments:****Attendance and Punctuality**

Consider how often the employee is late on assigned working days, leaves early on assigned working days, and is sick or absent, all within the context of organizational policies.

**Self-rating:**

|   |   |   |   |   |
|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|

**Comments****Supervisor rating:**

|   |   |   |   |   |
|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|

**Comments:**

**Judgment and Analysis**

How well does the employee effectively analyze and solve problems? Does the employee clearly use sound judgment to do so? Is the employee decisive? Does the employee act on decisions in a timely manner? Does the employee successfully overcome obstacles?

**Self-rating:**

|   |   |   |   |   |
|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|

**Comments****Supervisor rating:**

|   |   |   |   |   |
|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|

**Comments:****Adaptability**

How well does the employee adjust to new directives, procedures, duties, supervisors, or working environments? Does the employee accept new ideas with relative ease? Does the employee suggest new methods and approaches to work?

**Self-rating:**

|   |   |   |   |   |
|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|

**Comments****Supervisor rating:**

|   |   |   |   |   |
|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|

**Comments:**

**Self-Regulation and Conduct**

Does the employee have the respect of his or her work group? How well does the employee plan and organize work duties? Does the employee coordinate well with other workers and departments? To what extent does the employee manage day-to-day administrative duties? Is the employee a positive role model for peers and/or does he or she assist other workers in accomplishing their own goals, duties, and objectives?

**Self-rating:**

|   |   |   |   |   |
|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|

**Comments****Supervisor rating:**

|   |   |   |   |   |
|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|

**Comments:**

—Overall

**Part IV—Overall Performance****Overall Assessment**

Use this space to specify the employee's overall job performance. The overall rating should reflect and take into account job criteria, behavioural, supervisory, and goal completion rankings.

**Self-rating:**

|   |   |   |   |   |
|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|

**Comments****Supervisor rating:**

|   |   |   |   |   |
|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|

**Comments:**

## **Part V – Areas of Focus for Next Review Period**

Objective #1

Objective #2

Objective #3

### **Development/Training Objectives**

Complete this section once you and the employee have discussed and agreed upon opportunities for improvement of the employee's performance/skills. Include training (either formal or informal) and/or developmental objectives, corresponding activities, and time frames for completion.

**Developmental/Training Objective #1**

**Developmental/Training Objective #2**

**Developmental/Training Objective #3**

**Supervisor Signature:**

**Date:**

## **Part VI –**

### **Employee Sign-Off**

I have been advised of my performance rankings. The rankings and comments in this review have been discussed and explained to me by my supervisor. My own comments are as follows:

**Employee Signature:**

**Date**