

2015 COACHING FORM (Part I - Expectations)

EMPLOYEE DETAILS

Employee Name: _____

Position Title: _____

Department: _____

Reviewer: _____

Area of Improvement Required: _____

Immediate Supervisor: _____

Immediate Supervisor Position Title: _____

2nd Level Supervisor: _____

2nd Level Supervisor Position Title: _____

Date of Coaching: _____

Evaluation Date: _____

Note: Review date must not be before or within the review period covered.

COACHING DETAILS Describe the job responsibilities, incident or behavior that needs to change and how the employee needs to change to meet expectations (include facts about events, dates, people, documents, etc.). Employee should understand that failure to meet and sustain acceptable performance or behavior will result in formal disciplinary action, up to and including termination of employment.

Areas for Improvement	Expected Outcome (GOALS)	Support from the Immediate Supervisor
<i>List the 4 job performance factors that the employee needs to be coached on or behaviour or conduct that needs to be corrected.</i>	<i>For each job performance factor or behaviour, write below what specific results is expected from employee after the coaching period?</i>	<i>As immediate supervisor, list down the things that you will do to support the employee in achieving the goals listed in this document.</i>
1.		
2.		
3.		
4.		

Note to employee: You are expected to perform your job duties efficiently and effectively on a consistent and ongoing basis. Failure to show improvement in your job performance or behavior by stated deadlines and/or any future violations of the same or similar nature will subject you to further disciplinary action, up to and including termination of employment.

EMPLOYEE ACKNOWLEDGMENT

<p>Immediate Supervisor's Acknowledgment <i>I have discussed and thoroughly explained the Coaching Form to the employee.</i></p> <p>_____ <i>Immediate Supervisor's Name and Signature</i></p> <p>_____ <i>Date Signed</i></p> <p>Second Level Manager's Acknowledgment <i>I have reviewed and approved the Coaching Form.</i></p> <p>_____ <i>Second Level Manager's Name and Signature</i></p> <p>_____ <i>Date Signed</i></p>	<p>Employee's Acknowledgment receipt of COACHING <i>By signing below I acknowledge that the expectations listed above have been thoroughly discussed to me and that I commit to working with my immediate supervisor to meet the expectations set forth in this document. I understand that my failure to meet the agreed goals/changes/improvements listed above can constitute to poor performance and may lead to further disciplinary measures up to and including termination of employment.</i></p> <p>_____ <i>Employee's Name and Signature</i></p> <p>_____ <i>Date Signed</i></p>
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- End of Coaching Form (Part I – Expectations) -

Note to Immediate Supervisor: Save a copy of this file. You will need to retrieve this during the evaluation date listed above. During the coaching date, you only need to print page 1 and 2 for employee's acknowledgment. During the evaluation date, print only pages 3 and 4

2015 COACHING FORM (Part II - Evaluation)

EMPLOYEE DETAILS

Employee Name: _____

Position Title: _____

Department: _____

Reviewer: _____

Area of Improvement Required: _____

Immediate Supervisor: _____

Immediate Supervisor Position Title: _____

2nd Level Supervisor: _____

2nd Level Supervisor Position Title: _____

Date of Coaching: _____

Evaluation Date: _____

Note: Review date must not be before or within the review period covered.

Instructions: Both employee and immediate supervisor will rate employee's performance on achieving the target job performance or behaviors that were identified during the coaching period. Immediate supervisor shall send this file first to employee for self-rating, and employee shall forward his filled up form to immediate supervisor for supervisor's rating. Use the rating system below to rate your performance. Rate one (1) if the employee totally failed to meet the expected job performance/behaviour and 10 if the employee surpassed expectations. Rate 5 if the performance is just meeting expectation.

1.....

5.....

10.....

Failed expectations

Met expectations (minimum acceptable performance)

Very Much Exceeded Expectations

The AREAS FOR IMPROVEMENT and EXPECTED OUTCOME (GOALS) are already pre-populated based on what was agreed during the coaching date. Do not edit these columns. Employee must only input his/her self-rating and immediate supervisor must only input his/her rating. The form shall automatically calculate the averages.

Areas for Improvement	Expected Outcome (GOALS)	Employee's Self - Rating	Supervisor's Rating
List the 4 job performance factors that the employee needs to be coached on or behaviour or conduct that needs to be corrected.	For each job performance factor or behaviour, write below what specific results is expected from employee after the coaching period?	Employee rates his/her performance on this expected outcome:	IS's rates employee's performance on this expected outcome:
1.			
2.			
3.			



Areas for Improvement	Expected Outcome (GOALS)	Employee's Self - Rating	Supervisor's Rating
4.			
	AVERAGES:		
	Weighed Average:		

SCORING MATRIX

The final score will be the average of all scores obtained in the performance evaluation. The minimum acceptable rating for continued employment is Good (Meets Expectation).

8.00 - 10.00	Excellent (Exceeds expectations). Performance consistently exceeded expectations in all essential areas of responsibility, and the quality of work overall was excellent. Goals were met.
5.00 - 7.99	Good (Meets expectations). Performance consistently met expectations in all essential areas of responsibility, at times possibly exceeding expectations, and the quality of work overall was very good. The most critical goals were met.
3.00 - 4.99	Fair (Improvement needed). Performance did not consistently meet expectations; performance failed to meet expectations in one or more essential areas of responsibility, and/or one or more of the most critical goals were not met.
0 - 2.99	Poor (Unsatisfactory). Performance was consistently below expectations in most essential areas of responsibility, and/or reasonable progress toward critical goals was not made. Significant improvement is needed in one or more important areas.

EVALUATION SCORES AND RECOMMENDATION

Due to the fact that the immediate supervisor is more objectively aware of the employee's relative contribution to the organization, the immediate supervisor rating will constitute 80% of the total average score, While the employee's self-rating is 20%.

Employee's Total Weighed Average Score:		Recommendation:	
Final Rating:		Effective Date of Recommendation:	
Other remarks about the recommendation: (Optional)		Next Evaluation Date: (in case of another coaching)	

EMPLOYEE ACKNOWLEDGMENT

<div>Immediate Supervisor's Acknowledgment <i>I have discussed the performance review document with the employee and advised the of his/her overall rating.</i></div> <div><div>_____ <i>Immediate Supervisor's Name and Signature</i></div><div>_____ <i>Date Signed</i></div></div>	<div>Leader's Acknowledgment of PERFORMANCE REVIEW Document <i>My supervisor/manager has reviewed and discussed the performance review document with me. My signature means that I have been advised of my performance status.</i></div> <div><div>_____ <i>Employee's Name and Signature</i></div><div>_____ <i>Date Signed</i></div></div>
<div>Second Level Manager's Acknowledgment <i>I have reviewed and approved the performance review document and overall rating.</i></div> <div><div>_____ <i>Second Level Manager's Name and Signature</i></div><div>_____ <i>Date Signed</i></div></div>	

- End of Coaching Form (Part II – Evaluation) - **Note:** Page 1 and 2 are the Part I – Expectations No Part II shall be completed without completing Part I.