

Sample

**Merit Guidelines**  
(Recommended Merit Increases)

Rating	1.5 to 2.0%	2.0 to 2.5%	2.5 to 3.0%	3.0 to 3.5%	3.5 to 4.0%	4.0 to 4.5%	4.5 to 5.0%	5.0 to 5.5%	5.5 to 6.0%
EC									
OP									
SC+									
SC									
SP									
SC-									
NI									
UP									

Recommended Increase
Unacceptable Increase

< 90% compa-ratio	90% - 110% compa-ratio	> 110% compa-ratio
A-Zone review timing	B-Zone review timing	C-Zone review timing
1st review in 6 to 9 months	Review in 12 months	Review in 12 to 18 months
Other reviews in 12 months*		

\* note: A-Zone review timing may be more frequent when warranted by exceptional individual performance.

## PERFORMANCE FACTORS

Rate level of performance for each factor by placing a mark in the appropriate box. Use a "+" or "-" where applicable. (See *Performance Management Manual* for information on the performance factors, dimensions, and behavioral examples.)

Factors	Dimensions	Ratings		
		NI	SC	EC
KNOWLEDGE				
Job and Business Knowledge	Self Development, Job Expertise / Knowledge Resource, Business Plan Disciplines, Industry Expertise, Problem Solving			
Administration	Quarterly Goals and Objectives, Work Efficiency, Plan and Organize, Procedure and Process Orientation			
ENERGY				
Motivation / Drive	Energy, Initiative and Urgency, Innovation, Results Oriented, Perseverance			
Professional Accountability	Build Relationships, Disciplined Behavior, Personal Accountability, Foster Teamwork, Optimism			
PASSION				
Commitment	Job and Organizational Commitment, Customer Focus, Value Diversity, Manage Change, Resilience			
Leadership	Selection and Development, Motivate Performance, Lead By Example, Provide Direction, Influence Others, Communicate Effectively			

## RESULTS

Summarize accomplishments achieved during the review period, and also identify any objectives that were not met. Include **QUARTERLY OBJECTIVES AND ACCOMPLISHMENTS**, implementation of **BUSINESS PLAN DISCIPLINES** where appropriate, and/or **PRODUCTION MEASUREMENT RESULTS**.

## PERFORMANCE FEEDBACK

Summarize **STRENGTHS** and **AREAS FOR IMPROVEMENT**. Provide specific examples of behavior, considering accomplishments and performance factors.



Employee ID: \_\_\_\_\_

Employee: \_\_\_\_\_ Review Period: \_\_\_\_\_

Position: \_\_\_\_\_ Last Rating: \_\_\_\_\_

Department: \_\_\_\_\_ Supervisor: \_\_\_\_\_

Employee's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Supervisor's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Date of Next Performance Review (No longer than 12 months): \_\_\_\_\_

### OVERALL PERFORMANCE RATING

Rate overall performance by placing a mark at the most appropriate place on the rating scale. Consider accomplishments and the performance factors in determining the overall performance rating.

NEEDS IMPROVEMENT	SUCCESSFUL CONTRIBUTOR			EXCEPTIONAL CONTRIBUTOR
Improvement required to meet the objectives and expectations of the position.	Competent and valued performer who consistently meets the objectives and expectations of the position.			Highly skilled, knowledgeable performer and positive role model whose performance consistently surpasses the objectives and expectations of the position.
NI	-	SC	+	EC

The following rating scale should be used in place of the scale above for (1) new employees or those who have been transferred or promoted to a significantly different position or (2) employees in a formal training program or period.

UNACCEPTABLE PROGRESS	SATISFACTORY PROGRESS	OUTSTANDING PROGRESS
Unacceptable progress through the training program or period.	Making satisfactory progress through the training program or period.	Making outstanding progress through the training program or period.
UP	SP	OP