

Annual Performance Review

The following sample document was very kindly provided by a member of the CCA Standard© Performance Management User Group.

Annual Performance Review

Name:	Date of Review:
	Reviewing Manager:

Performance Summary - Balanced Scorecard Results

	Customer	Finance	Operations	People & Learning
Quarter 1				
Quarter 2				
Quarter 3				
Quarter 4				
Overall Rating				

To calculate overall rating for each key performance area, add the ratings for each quarter and divide by 4. Use these ratings to calculate overall balanced scorecard rating.

	Rating		Weighting		
Customer		X		=	
Finance		X		=	
Operations		X		=	
People & Learning		X		=	
Overall Balanced Scorecard Rating					

Example: For the following scorecard:

Customer	Finance	Operations	People & Learning
WEIGHTING = 40% Rating = Exceptional (4 points)	WEIGHTING = 20% Rating - Successful (3 points)	WEIGHTING = 20% Rating = Requires some development (2 points)	WEIGHTING = 20% Rating = Requires some development (2 points)

The overall rating would be calculated as follows:

	Rating		Weighting		
Customer	4	X	0.4	=	1.6
Finance	2	X	0.2	=	0.4
Operations	2	X	0.2	=	0.4
People & Learning	3	X	0.2	=	0.6
Overall Balanced Scorecard Rating					3.0

Competency Assessment

Competency	Examples of Performance	Rating

Overall Competency Assessment

Exceptional	The individual consistently displays, and in some areas exceeds the behaviours detailed in the competency model for their organisational level.
Successful	The individual consistently displays the behaviours detailed in the competency model for their organisational level.
Minimum Expected	The individual displays many of the behaviours detailed in the competency model for their organisational level. Some behaviours are lacking or inconsistent.
Below Expectations	There are several areas in which the individual fails to display the necessary behaviours expected at their organisational level.

Performance Summary for Year

Competencies - Strengths/Weaknesses

Balanced Scorecard - Strengths/Weaknesses

Progress Against Development Action Plan

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Balanced Scorecard - Strengths/Weaknesses

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Job Holder's Comments

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