



## I. Volunteer performance form

Name: \_\_\_\_\_

Evaluation Period: \_\_\_\_\_

Title: \_\_\_\_\_ Date: \_\_\_\_\_

Location of Volunteer Task assignment/Deployment: \_\_\_\_\_

Supervising officer hosting organisation/partner organisation: \_\_\_\_\_

### PERFORMANCE PLANNING AND RESULTS

#### Performance Review

- Use a ToR as point of reference for performance and goals to be evaluated
- Rete the person's level of performance, using the definitions below.
- Review with volunteers each performance factor used to evaluate his/her work performance.
- Give an overall rating in the space provided, using the definitions below as a guide.

#### Performance Rating Definitions

The following ratings must be used to ensure commonality of language and consistency on overall ratings: (There should be supporting comments to justify ratings of "Outstanding" "Below Expectations, and "Unsatisfactory"):

- Outstanding (Performance is consistently superior)
- Exceeds Expectations (Performance is routinely above job requirements)
- Meets Expectations (Performance is regularly competent and dependable)
- Below Expectations (Performance fails to meet job requirements on a frequent



- basis)
- Unsatisfactory (Performance is consistently unacceptable)

**A. PERFORMANCE FACTORS** (use ToR description as basis of this evaluation)

<p><b>Administration</b> - Measures effectiveness in planning, organizing and efficiently handling activities and eliminating unnecessary activities</p>	<p>Outstanding Exceeds expectations Meets expectations Below expectations Unsatisfactory NA</p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<p><b>Knowledge of Work</b> - Consider volunteer's skill level, knowledge and understanding of all phases of the job and those requiring improved skills and/or experience</p>	<p>Outstanding Exceeds expectations Meets expectations Below expectations Unsatisfactory NA</p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<p><b>Communication</b> - Measures effectiveness in listening to others, expressing ideas, both orally and in writing and providing relevant and timely information to management, co-workers, and management in partner organisation.</p>	<p>Outstanding Exceeds expectations Meets expectations Below expectations Unsatisfactory NA</p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<p><b>Teamwork</b> - Measures how well this individual gets along with fellow staff, respects the rights of other staff and shows a cooperative spirit.</p>	<p>Outstanding Exceeds expectations Meets expectations Below expectations Unsatisfactory NA</p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<p><b>Decision Making/Problem Solving</b> - Measures effectiveness in understanding problems and making timely, practical decisions.</p>	<p>Outstanding Exceeds expectations Meets expectations</p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>



	Below expectations Unsatisfactory NA	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<b>Expense Management</b> - Measures effectiveness in establishing appropriate reporting and control procedures; operating efficiently at lowest cost; staying within established budgets.	Outstanding Exceeds expectations Meets expectations Below expectations Unsatisfactory NA	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<b>Independent Action</b> - Measures effectiveness in time management; initiative and independent action within prescribed limits.	Outstanding Exceeds expectations Meets expectations Below expectations Unsatisfactory NA	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<b>Job Knowledge</b> - Measures effectiveness in keeping knowledgeable of methods, techniques and skills required in own job and related functions; remaining current on new developments affecting organisation partner/hosting/sending and its work activities.	Outstanding Exceeds expectations Meets expectations Below expectations Unsatisfactory NA	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<b>Leadership</b> - Measures effectiveness in accomplishing work assignments through establishing challenging goals; delegating and coordinating effectively; promoting innovation and team effort.	Outstanding Exceeds expectations Meets expectations Below expectations Unsatisfactory NA	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<b>Managing Change and Improvement</b> - Measures effectiveness in initiating changes, adapting to necessary changes from old methods when they are no longer practical, identifying new methods and generating improvement in facility's performance.	Outstanding Exceeds expectations Meets expectations Below expectations Unsatisfactory NA	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<b>Volunteer's Responsiveness</b> - Measures responsiveness and courtesy in dealing with	Outstanding Exceeds expectations	<input type="checkbox"/> <input type="checkbox"/>



capacity building of partner staff, external actors and relations	Meets expectations Below expectations Unsatisfactory NA	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<b>Personal Appearance</b> - Measures neatness and personal hygiene appropriate to position.	Outstanding Exceeds expectations Meets expectations Below expectations Unsatisfactory NA	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<b>Dependability</b> - Measures how well employee complies with instructions and performs under unusual circumstances; consider record of attendance and punctuality.	Outstanding Exceeds expectations Meets expectations Below expectations Unsatisfactory NA	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<b>Safety</b> - Measures individual's work habits and attitudes as they apply to working safely. Consider their contribution to accident prevention, safety awareness.	Outstanding Exceeds expectations Meets expectations Below expectations Unsatisfactory NA	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<b>Volunteer Responsiveness</b> - Measures responsiveness in completing job tasks in a timely manner.	Outstanding Exceeds expectations Meets expectations Below expectations Unsatisfactory NA	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

**B. EMPLOYEE STRENGTHS AND ACCOMPLISHMENTS:** Include those, which are relevant during this evaluation period. This should be related to performance or behavioural aspects you appreciated in their performance.



**C. PERFORMANCE AREAS WHICH NEED IMPROVEMENT:**

**D. PLAN OF ACTION TOWARD IMPROVED PERFORMANCE:**

**E. EMPLOYEE COMMENTS:**



**F. JOB DESCRIPTION REVIEW SECTION:** (Please check the appropriate box.)

**P** Employee job description has been reviewed during this evaluation and no changes have been made to the job description at this time.

**P** Employee job description has been reviewed during this evaluation and modifications have been proposed to the job description. The modified job description is attached to this evaluation.

**G. SIGNATURES:**

Volunteer: \_\_\_\_\_ Date: \_\_\_\_\_

*(Signature does not necessarily denote agreement with official review and means only that the employee was given the opportunity to discuss the official review with the supervisor.)*

Evaluated by hosting organization: \_\_\_\_\_ Date: \_\_\_\_\_

Commented by EWB DK: \_\_\_\_\_ Date: \_\_\_\_\_



## I. Top 12 methods for sample volunteer performance appraisal:

### 1. Management by Objectives (MBO) Method

This is one of the best methods for the judgment of an employee's performance, where the managers and employees set a particular objective for employees and evaluate their performance periodically. After the goal is achieved, the employees are also rewarded according to the results. This performance appraisal method of management by objectives depends on accomplishing the goal rather than how it is accomplished.

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#### MBO Features

- MBO emphasizes participative set goals that are tangible, verifiable and measurable.
- MBO focuses attention on what must be accomplished (goals) rather than how it is to be accomplished (methods).
- MBO, by concentrating on key result areas translates the abstract philosophy of management into concrete phraseology. The technique can be put to general use (non- specialist technique). Further it is “a dynamic system which seeks to integrate the company's need to clarify and achieve its profit and growth targets with the manager's need to contribute and develop himself”.



- MBO is a systematic and rational technique that allows management to attain maximum results from available resources by focusing on achievable goals. It allows the subordinate plenty of room to make creative decisions on his own.

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## **2. Critical Incident Method**

In this method, the manager writes down the positive and negative behavioural performance of the employees. This is done throughout the performance period and the final report is submitted as the assessment of the employees. This method helps employees in managing their performance and improves the quality of their work.

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### ***Disadvantages of critical Incident***

This method suffers however from the following limitations:

- Critical incidents technique of evaluation is applied to evaluate the performance of superiors rather than of peers of subordinates.
- Negative incidents may be more noticeable than positive incidents.
- It results in very close supervision which may not be liked by the employee.
- The recording of incidents may be a chore for the manager concerned, who may be too busy or forget to do it.
- The supervisors have a tendency to unload a series of complaints about incidents during an annual performance review session.

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## **3. Behaviourally Anchored Rating Scales (BARS)**

The BARS method is used to describe a rating of the employee's performance which focuses on the specific behaviour as indicators of effective and ineffective performance. This method is usually a combination of two other methods namely, the rating scale and critical incident technique of employee evaluation.

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### ***Rating scales for BARS***

Each behaviour can rate at one of 7 scales as follows (you can set scales depend on your requirements)

- Extremely poor (1 points)
- Poor (2 points)



- Below average (3 points)
  - Average (4 points)
  - Above average (5 points)
  - Good (6 points)
  - Extremely good (7 points)
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#### 4. Behavioural Observation Scales (BOS)

It is defined as the frequency rating of critical incidents which the employee has performed over a specific duration in the organization. It was developed because methods like graphic rating scales and behaviourally anchored rating scales (BARS) depend on vague judgments made by the supervisors about employees.

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#### 5.360 Degree Performance Appraisal Method

The definition of this performance evaluation method is that, it is a system or process wherein the employees receive some performance feedback examples, which are anonymous and confidential from co-workers. This process is conducted by managers and subordinates who, through 360 degrees, measure certain factors about the employees. These are behaviour and competence, skills such as listening, planning and goal-setting, teamwork, character, and leadership effectiveness.

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#### **Advantages of 360-degree appraisal**

- Offer a more comprehensive view towards the performance of employees.
- Improve credibility of performance appraisal.
- Such colleague's feedback will help strengthen self-development.
- Increases responsibilities of employees to their customers.
- The mix of ideas can give a more accurate assessment.
- Opinions gathered from lots of staff are sure to be more persuasive.
- Not only manager should make assessments on its staff performance but other colleagues should do, too.
- People who undervalue themselves are often motivated by feedback from others.
- If more staff takes part in the process of performance appraisal, the organizational culture of the company will become more honest.



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## 6. Checklist and Weighted Checklist Method

The checklist method comprises a list of set objectives and statements about the employee's behaviour. For example, leadership skills, on-time delivery, innovation, etc. If the appraiser believes that the employee possesses the trait mentioned in the checklist, he puts a tick in front of it. If he thinks the employee doesn't have a particular trait, he will leave it blank and mentions about it in the improvement column. Weighted checklist is a variation of the checklist method where a value is allotted to each question. The value of each question can differ based on its importance. The total score from the checklist is taken into consideration for evaluating the employee's performance. It poses a strong threat of bias on the appraiser's end. Though this method is highly time-consuming and complex, it is widely used for performance evaluation.

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### Advantages and disadvantages of weighted checklist

- This method helps the manager in evaluation of the performance of the employee.
  - The ratter may be biased in distinguishing the positive and negative questions. He may assign biased weights to the questions.
  - This method also is expensive and time consuming.
  - It becomes difficult for the manager to assemble, analyse and weigh a number of statements about the employee's characteristics, contributions and behaviours.
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## 7. Graphic Rating Scale Method

Graphic rating scale is one of the most frequently used performance evaluation methods. A simple printed form enlists the traits of the employees required for completing the task efficiently. They are then rated based on the degree to which an employee represents a particular trait that affects the quantity and quality of work. A rating scale is adopted and implemented for judging each trait of the employee. The merit of using this method is that it is easy to calculate the rating. However, a major drawback of this method is that each characteristic is given equal weight and the evaluation may be subjective.

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## **Advantages and Disadvantage of the rating scales**

### ***Advantages of the rating scales***

- Graphic rating scales are less time consuming to develop.
- They also allow for quantitative comparison.

### ***Disadvantages of the rating scales***

- Different supervisors will use the same graphic scales in slightly different ways.
- One way to get around the ambiguity inherent in graphic rating scales is to use behaviour based scales, in which specific work related behaviours are assessed.
- More validity comparing worker's ratings from a single supervisor than comparing two workers who were rated by different supervisors.

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## **8. Comparative Evaluation Method**

Two ways are used to make a comparative evaluation, namely, the simple ranking method and the paired comparison method. In the simple or straight ranking method the employee is rated by the evaluator on a scale of best to worst. However, the evaluator may be biased and may not judge the overall performance effectively in the absence of fixed criteria. This kind of evaluation may be more opinion-based than fact-based.

Under the paired comparison method, the overall performance of one individual is directly compared with that of the other on the basis of a common criterion. This comparison is all evasive and not job-specific. While some employees emerge as clear front runners, there are others who seem to be lagging behind. This is not a popular evaluation system as employer's do not want to encourage discrimination. This is useful in companies which have a limited number of promotions or funds.

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### **Steps to conduct paired comparison analysis**

- List the options you will compare (elements as A, B, C, D, E for example).
- Create a table 6 rows and 7 columns.
- Write down option to column and row; A to row second, cell first from left and A to row first, cell second from left; B to row third, cell first from left and B to row first, cell third from left etc.; column seventh is total point.
- Identify importance from 0 (no difference) to 3 (major difference).



- Compare element “A” to B, C, D, E and place “point” at each cell.
- Finally, consolidate the results by adding up the total of all the values for each of the options. You may want to convert these values into a percentage of the total score.

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## **9. Forced Choice Method**

In this method, the appraiser is asked to choose from two pairing statements which may appear equally positive and negative. However, the statements dictate the performance of the employee. An excellent example of this can be "works harder" and "works smarter". The appraiser selects a statement without having knowledge of the favourable or the unfavourable one. This method works in companies where the appraiser shows a tendency to under-evaluate or over-evaluate the employees. Also, it is very costly to implement and does not serve the purpose of developing the employees. It can also frustrate the appraiser as he does not know which is the right option.

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## **10. Forced Distribution Method**

In this method, the appraiser rates employees according to a specific distribution. For example, out of a set of 5 employees, 2 will get evaluated as high, 2 will get evaluated as average while 1 will be in the low category. This method has several benefits as it tries to eliminate the leniency and central tendency of the appraiser. However, its biggest drawback is the fact that it encourages discrimination among the employees. Another major problem with this method is that it dictates that there will be forced distribution of grades even when all the employees are doing a good job.

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### ***Advantages and disadvantages of forced Ranking***

Advantages:

They force reluctant managers to make difficult decisions and identify the most and least talented members of the work group.

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