**Professional Staff Evaluation**

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| **INSTRUCTIONS:** | This form can be used:* annually
* semi-annually or
* for a specific engagement.
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| **Name of Staff Member:** |  |
| **Current Job Classification:** |  |
| **Type of Evaluation:** | 🞏 annual |
| 🞏 semi-annual |
| 🞏 specific engagement |
| 🞏 other (please specify) |

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| **Rating Scale:** |
| O | = | **Outstanding** – indicates extraordinarily high performance, well beyond that expected of someone at this level. |
| VG | = | **Very good** – indicates performance that exceeds usual expectations of someone at this level. |
| G | = | **Good** – indicates performance that meets what is expected of someone at this level. |
| A | = | **Acceptable** |
| BN | = | **Below normal** – indicates that assignments and responsibilities are not being met as expected. |
| U | = | **Unacceptable** – indicates unacceptable performance in need of immediate improvement. |
| NA | = | **Not applicable** – assignments during evaluation period did not call for evaluation of this attribute. |

1. **EVALUATION OF PROFESSIONAL SKILLS:**

| **O** | **VG** | **G** | **A** | **BN** | **U** | **NA** |  |
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| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | Ability to establish workload priorities |
| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | Ability to organise and plan individual jobs |
| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | Ability to supervise work including delegation, training and development of other staff members |
| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | Ability to complete work accurately and in a timely manner |
| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | Understands assignments and follows instructions |
| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | Neatness and clarity of work |
| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | Ability to work independently |
| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | Ability to analyse complex matters |
| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | Ability to make decisions |

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| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | Ability to distinguish between material and immaterial items |
| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | Relations with client personnel and firm associates |
| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | Communication capabilities – written |
| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | Communication capabilities – oral |
| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | Displays enthusiasm for work, especially more advanced or technical projects |
| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | Response to suggestions and guidance from supervisors |
| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | Delegation to other staff |
| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | Supervision and review of staff |
| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | On-the-job training and development of staff |

Comments

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1. **TECHNICAL SKILLS:**

| **O** | **VG** | **G** | **A** | **BN** | **U** | **NA** |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | Ability to comprehend various clients’ accounting systems and adapt work as required |
| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | Work paper preparation or review techniques (neat, accurate, comprehensive, and understandable) |
| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | Knowledge of accounting and tax theory and application |
|  |  |  |  |  |  |  | Ability in relation to: |
| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | * tax returns
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| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | * financial statements
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| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | * monthly accounting
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| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | * audit work papers and related reports
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| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | Research techniques |
| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | Tax planning ideas and techniques |

Comments:

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**3 PERSONAL CHARACTERISTICS:**

| **O** | **VG** | **G** | **A** | **BN** | **U** | **NA** |  |
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| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | Responsibility (trustworthy and conscientious) |
| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | Integrity (loyal, sincere, reliable and punctual) |
| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | Attitude (co-operative, courteous, friendly and professional) |
| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | Autonomy (able to work independently when required) |
| 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | 🞏 | Commitment (dedication, team spirit) |

Comments:

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**4 ACHIEVEMENTS SINCE LAST REVIEW:**

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**5 OVERALL COMMENTS:**

 **STRENGTHS:**

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 **AREAS FOR DEVELOPMENT / IMPROVEMENT:**

 **(GOALS FOR NEXT 6/12 MONTHS)**

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 **SUMMARY/OTHER COMMENTS:**

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**6 NOTES IN MEETING:**

| Topics / Issues discussed during meeting: | Staff member comments / reaction |
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| 3 |  |  | 3 |  |  |
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**7 STAFF COMMENTS:**

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| **Evaluated by:** | (Signed) | **Date:** |
| **Staff Member:** | (Signed) | **Date:** |
| **Reviewed by:** | (Signed) | **Date:** |