

T. K. Lo & Co - Staff Assignment Appraisal Form

Appendix LA_I

This appendix is for reference only and should be tailored according to the firm's specific circumstances and requirements.

Section 1

To be completed by the staff member.

Name: _____
Position/Grade: _____
Name of client(s): _____
Length of assignment: _____
Period of appraisal review: _____

Section 2

To be completed by the staff member.

Nature of work assignment(s):

Brief details of tasks performed:

Self-assessment of performance on assignment(s):

Achievement, non-compliance and areas for improvement:

Trainings or continuing professional development program undertaken to fulfil the job position:

Additional comments:

Section 3

To be completed by the Senior/Manager responsible for the assignment.

A - Outstanding | B - Good | C - Satisfactory | D - Unsatisfactory

Based on the expected level of performance for someone at the grade specified overleaf, consider the following factors:

	A	B	C	D	Comments
Technical ability					
Professionalism and maturity					
Commercial sense and financial awareness					
Ability to get on with staff and clients					
Judgement					
Motivation and attitude					
Initiative					
Adequacy of completion of assignments					
Time management/within budget					

Quality of work performed:

Areas for development/ improvement:

Additional comments:

Section 4

To be completed by the staff member.

Staff member's comments on appraisal (if any):

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Staff Member		Dated:	
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Section 5

To be completed by the Senior/Manager responsible for the assignment or the Staff Partner as appropriate.

Other comments (if any):

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Senior/Manager		Dated:	
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Staff Partner		Dated:	
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Note:

Once completed and signed, please send:

1. Original document to the human resources department for permanent storage in the staff's file.
2. A copy is to be provided to the staff for his/her own records.
3. If necessary, forward a copy to the staff's supervisor for future reference.