



**Law Society
of Ireland**

**PERFORMANCE
MANAGEMENT
TEMPLATE 1**





PERFORMANCE MANAGEMENT TEMPLATE 1



PERFORMANCE REVIEW FORM

The Performance Review (PR) form should be used in performance review and probation review meetings.

The PR form seeks to put a structure on the performance review process in that it sets out objective and relevant criteria for assessing how someone has performed in the period under review.

Such performance review meetings should take place twice a year (mid-year and end of year) with informal check-ins also taking place during the 12-month period.

All people managers have a responsibility to ensure that these meetings happen and to ensure that their staff receive regular constructive feedback which acknowledges where performance standards have been met/exceeded but also where improvement is required.

Engaging in this process sends a positive message to staff that their contribution is valued and that their manager takes an interest in meeting their motivation, development and career planning needs. It also ensures that there is a paper trail in place to document performance history.

Performance Review Form

Name:

Role:

Date of review:

Period under review:

SECTION 1: KEY ACCOUNTABILITIES

Accountability/Task	Self Assessment	Manager Assessment
Preparation and drafting legal documents	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectation <input type="checkbox"/> On Target <input type="checkbox"/> Below Expectation <input type="checkbox"/> Unacceptable	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectation <input type="checkbox"/> On Target <input type="checkbox"/> Below Expectation <input type="checkbox"/> Unacceptable
Client advisory / relationship development	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectation <input type="checkbox"/> On Target <input type="checkbox"/> Below Expectation <input type="checkbox"/> Unacceptable	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectation <input type="checkbox"/> On Target <input type="checkbox"/> Below Expectation <input type="checkbox"/> Unacceptable
New business development	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectation <input type="checkbox"/> On Target <input type="checkbox"/> Below Expectation <input type="checkbox"/> Unacceptable	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectation <input type="checkbox"/> On Target <input type="checkbox"/> Below Expectation <input type="checkbox"/> Unacceptable
Legal research	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectation <input type="checkbox"/> On Target <input type="checkbox"/> Below Expectation <input type="checkbox"/> Unacceptable	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectation <input type="checkbox"/> On Target <input type="checkbox"/> Below Expectation <input type="checkbox"/> Unacceptable
Keep abreast of legal developments	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectation <input type="checkbox"/> On Target <input type="checkbox"/> Below Expectation <input type="checkbox"/> Unacceptable	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectation <input type="checkbox"/> On Target <input type="checkbox"/> Below Expectation <input type="checkbox"/> Unacceptable
Supervise trainees	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectation <input type="checkbox"/> On Target <input type="checkbox"/> Below Expectation <input type="checkbox"/> Unacceptable	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectation <input type="checkbox"/> On Target <input type="checkbox"/> Below Expectation <input type="checkbox"/> Unacceptable

Accountability/Task	Self Assessment	Manager Assessment
Time recording/billing	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectation <input type="checkbox"/> On Target <input type="checkbox"/> Below Expectation <input type="checkbox"/> Unacceptable	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectation <input type="checkbox"/> On Target <input type="checkbox"/> Below Expectation <input type="checkbox"/> Unacceptable
Other	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectation <input type="checkbox"/> On Target <input type="checkbox"/> Below Expectation <input type="checkbox"/> Unacceptable	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectation <input type="checkbox"/> On Target <input type="checkbox"/> Below Expectation <input type="checkbox"/> Unacceptable

SECTION 2: COMPETENCIES AND SKILLS

Competency/Skill	Self Assessment	Manager Assessment
1. Accountability	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectation <input type="checkbox"/> On Target <input type="checkbox"/> Below Expectation <input type="checkbox"/> Unacceptable	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectation <input type="checkbox"/> On Target <input type="checkbox"/> Below Expectation <input type="checkbox"/> Unacceptable
2. Time management and personal organisation	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectation <input type="checkbox"/> On Target <input type="checkbox"/> Below Expectation <input type="checkbox"/> Unacceptable	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectation <input type="checkbox"/> On Target <input type="checkbox"/> Below Expectation <input type="checkbox"/> Unacceptable
3 . Attention to detail	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectation <input type="checkbox"/> On Target <input type="checkbox"/> Below Expectation <input type="checkbox"/> Unacceptable	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectation <input type="checkbox"/> On Target <input type="checkbox"/> Below Expectation <input type="checkbox"/> Unacceptable
4. Collaboration and teamwork	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectation <input type="checkbox"/> On Target <input type="checkbox"/> Below Expectation <input type="checkbox"/> Unacceptable	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectation <input type="checkbox"/> On Target <input type="checkbox"/> Below Expectation <input type="checkbox"/> Unacceptable
5. Client relation skills.	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectation <input type="checkbox"/> On Target <input type="checkbox"/> Below Expectation <input type="checkbox"/> Unacceptable	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectation <input type="checkbox"/> On Target <input type="checkbox"/> Below Expectation <input type="checkbox"/> Unacceptable
6. Attention to detail	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectation <input type="checkbox"/> On Target <input type="checkbox"/> Below Expectation <input type="checkbox"/> Unacceptable	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectation <input type="checkbox"/> On Target <input type="checkbox"/> Below Expectation <input type="checkbox"/> Unacceptable

Competency/Skill	Self Assessment	Manager Assessment
7. Leadership ability.	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectation <input type="checkbox"/> On Target <input type="checkbox"/> Below Expectation <input type="checkbox"/> Unacceptable	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectation <input type="checkbox"/> On Target <input type="checkbox"/> Below Expectation <input type="checkbox"/> Unacceptable
8. Timekeeping and attendance	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectation <input type="checkbox"/> On Target <input type="checkbox"/> Below Expectation <input type="checkbox"/> Unacceptable	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectation <input type="checkbox"/> On Target <input type="checkbox"/> Below Expectation <input type="checkbox"/> Unacceptable
9. Participation in broader firm activities	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectation <input type="checkbox"/> On Target <input type="checkbox"/> Below Expectation <input type="checkbox"/> Unacceptable	<input type="checkbox"/> Outstanding <input type="checkbox"/> Exceeds Expectation <input type="checkbox"/> On Target <input type="checkbox"/> Below Expectation <input type="checkbox"/> Unacceptable

SECTION 3: EMPLOYEES EVALUATION

1. What were your key achievements and highlights in the period under review?

2. What elements of your job interest you the most?

3. What elements of your job do you find more challenging?

4. What action could be taken to improve your performance in your current position by you, and your manager?

5. What are your key goals and most important tasks in the coming year?

SECTION 4: MANAGERS EVALUATION

1. Comment on the key achievements/objectives that the employee achieved in the period under review.

2. Identify the main strengths that the employee brought to his/her role over the past year.

3. Identify the main areas of development for the employee in the coming year.

SECTION 5: TRAINING NEEDS/RATING/ SIGN OFF

Competency/Skill	Training method/provider	Timeframe

Overall Performance Rating (to be completed by Manager)

- Outstanding
- Exceeds Expectation
- On Target
- Below Expectation
- Unacceptable

Additional Comments by manager or employee

Employee's Signature: _____ Date: _____



This resource was developed by CascadeHR in consultation with the Law Society of Ireland.

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