

**Evaluation Team Leader Performance Monitoring Form**

# *(Please complete this form electronically in MS Word and forward it to the Chair of the APAC MRA MC)*

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| ***CONFIDENTIAL*** | | | | | | | |
| Team Leader: | |  | | Employer: |  | | |
|  | | (Name) | |  | (APAC Member) | | |
| Evaluated AB: | |  | | | | | |
| Evaluation Dates: | |  | | Team Member: |  | | |
|  |  |  |  |  | (Name) | | |
|  | | | | | | | |
| Please score each of the performance categories according to the following scale (see Note below):  (For scores of 1 or 2, please detail specifics in the Comments section below.) | | | | | | | |
|  | 1 = Poor | 2 = Weak | 3 = Satisfactory | 4 = Good | 5 = Exceptional |  | |
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|  | **General** | | | | |  |  |
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| (1) | Team Leader’s overall performance | | | | |  |  |
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| (2) | Team Leader’s understanding of APAC MRA-001, ISO/IEC 17011 & other MRA requirements | | | | |  |  |
|  | | | | | | | |
| (3) | Team Leader’s understanding of the relevant ISO, IAF & ILAC accreditation criteria  (e.g. ISO/IEC 17020, 17021, 17024, 17025, 17043, 17065, ISO 15189, 17034, IAF/ILAC-A Series etc) | | | | |  |  |
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| (4) | Team Leader’s preparation for the visit | | | | |  |  |
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|  | **Planning and Management of Peer Evaluation** | | | | |  |  |
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| (5) | Prior to the on-site evaluation, the documentation, including relevant management system documents and previous peer evaluation reports, when applicable, was reviewed | | | | |  |  |
|  | | | | | | | |
| 6) | The plan describes:   1. Objectives 2. Assessment criteria and reference documents (including APAC MRA policies and procedures) 3. Scope, dates and places to be evaluated 4. Roles and responsibilities of team members   e) Working and reporting language | | | | |  |  |
|  | | | | | | | |
| (7) | Plan was reviewed and accepted by the AB to be evaluated before the on-site visit. | | | | |  |  |
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| (8) | During the evaluation, the Team Leader manages the team’s activities and keeps constant reviews to ensure the achievement of objectives | | | | |  |  |
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|  | **Opening Meeting** | | | | |  |  |
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| (9) | Introduces self and group, describing their functions in a general manner. | | | | |  |  |
|  | | | | | | | |
| (10) | Informs about matters related with confidentiality | | | | |  |  |
|  | | | | | | | |
| (11) | Confirms evaluation plan, activities, and date. If applicable, establishes changes in plan | | | | |  |  |
|  | | | | | | | |
| (12) | Confirms the objectives, scope, requirements and criteria of the evaluation | | | | |  |  |
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| (13) | Presents and agrees on work methodology, procedures, sample and limitations of sampling, and collecting evidence method | | | | |  |  |
|  | | | | | | | |
| (14) | Verifies the resources, confirmation of safety conditions and access to facilities | | | | |  |  |
|  | | | | | | | |
| (15) | Invites the AB being evaluated to seek clarification, and provides clarification | | | | |  |  |
|  | | | | | | | |
| (16) | Informs about the right of the AB being evaluated to make appeals, and complaints or seek clarifications and how to present them (*can also be done in the closing meeting*) | | | | |  |  |
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|  | **Ability to Collect and Verify Information** | | | | |  |  |
|  | | | | | | | |
| (17) | Ability to obtain and assess objective evidence | | | | |  |  |
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| (18) | Appropriate sampling methodology | | | | |  |  |
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| (19) | The analysis and classification of the evaluation findings were made accordingly to the agreed methodology | | | | |  |  |
|  | | | | | | | |
| (20) | Ability to report the findings of the evaluation | | | | |  |  |
|  | | | | | | | |
| (21) | Ability to apply APAC MRA policies and procedures | | | | |  |  |
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| (22) | Ability to perform the peer evaluation process in a timely manner and without deviating due to distractions | | | | |  |  |
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|  | **Personal Attributes** | | | | |  |  |
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| (23) | Ethical  Establishes and maintains an objective, impartial and ethical behaviour, and professional attitude both personally and in the group | | | | |  |  |
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| (24) | Open mindedness  Willingness to consider alternate ideas or views. To react with sensitivity to the conventions and culture of the country or region in which the peer evaluation is performed | | | | |  |  |
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| (25) | Diplomatic  Tactful in dealing with people and effectively handles stressful situations | | | | |  |  |
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| (26) | Observant  Constantly aware of physical surrounding and activities (visual and listening ability). To evaluate constantly the effects on the peer evaluation process | | | | |  |  |
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| (27) | Adaptability  Able to understand and adapt to different situations. Know where to look and when to ask | | | | |  |  |
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| (28) | Tenacity  Persistent, focused, oriented towards objectives. Does not change the subject until exhausting the point | | | | |  |  |
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| (29) | Decisiveness  Firm, able to make objective decisions based on analyzed information | | | | |  |  |
|  | | | | | | | |
| (30) | Self-reliance  Acts and functions independently | | | | |  |  |
|  | | | | | | | |
| (31) | Communications  Able to clearly express in speech and writing, maintain communication in an efficient manner | | | | |  |  |
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|  | **Closing Meeting** | | | | |  |  |
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| (32) | Prior to the closing meeting, the evaluation findings were reviewed with the team to provide supporting objective evidence | | | | |  |  |
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| (33) | Prior to the closing meeting, prepare in consultation with the Team Members, an objective summary report and conclusion of the peer evaluation | | | | |  |  |
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| (34) | Meeting takes place in a polite manner | | | | |  |  |
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| (35) | The findings and recommendations were communicated effectively | | | | |  |  |
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| (36) | Procedures for reporting and closure of non-conformities, if applicable, are communicated | | | | |  |  |
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| (37) | Strengths and opportunities for improvements, if applicable, are communicated | | | | |  |  |
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| Comments: (As appropriate, please relate comments to each relevant category above. Attach extra pages if needed.) | | | | |
| List two of the Team Leader’s key strengths: | | | | |
| 1. |  | | | |
| 2. |  | | | |
| Suggest two areas of improvement for future evaluations: | | | | |
| 1. |  | | | |
| 2. |  | | | |
| Any additional comments: | | | | |
|  | | | | |
| **If the subject is a Provisional Team Leader, do you recommend appointment as an APAC Team Leader? (Yes / No / n.a.)**  **…………………………….** | | | | |
| Team Member: | |  | Date: |  |
|  | | (Name or Signature) |  | (Completion of this form) |
| ***NOTE:*** *For consistency purposes, the following definitions shall be considered while scoring an evaluator’s performance:*  *Poor = Did not meet a majority of APAC’s expectations. Removal from the list of APAC evaluators may need to be considered.*  *Weak = Does not meet all of APAC’s expectations. Significant areas for improvement were identified and communicated to the evaluator. Performance needs to improve to meet APAC’s expectations.*  *Satisfactory = Meets, but does not exceed, APAC’s minimum expectations. Areas or improvement could be identified.*  *Good = Exceeds APAC’s minimum expectations, but minor areas for improvement could be identified.*  *Exceptional = Sets the standard that all evaluators should follow; little room for improvement. This score would only be applied to the very best.* | | | | |

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| **For APAC MRA MC use only:** | | | | | | | | |
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| **Scores Entered in Database:** | |  |  | | | | | |
|  | | YES |  | | | | | |
| **Reviewed Completed By:** |  | | |  | |  | |  |
|  | DATE | | |  | NAME (APAC MRA MC Chair) | |  | |
| **Comments / Actions:** | | | | | | | | |
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| APAC MRA MC Chair to forward completed form to APAC Secretariat | | | | | | | | |