Sample Paralegal Evaluation Form

Paralegal: ____________________________________________

Position Level: ________________________________________

Joined Firm: _____ / _____ / _____

Review Period: From _____________ to _____________

Date of evaluation: _____ / _____ / _____

Evaluator: ____________________________________________

Evaluation Purpose: Improving skills is a life-long endeavor for each of us. The formal evaluation is an opportunity to document individual performance for a period of time and to agree on an action plan for the upcoming period. This form is designed to organize our thoughts and to focus on the key skill blocks that form the foundation for a productive paralegal. There is opportunity to identify strengths as well as weaknesses. It is the intention of the firm that evaluations be a constructive management tool to improve individual performance.

Ratings to be Used

Scale:
4 - Consistently Exceeds Expectations
3 - Often Exceeds Expectations
2 - Meets Expectations
1 - Improvement Necessary
NB - No Basis

Listed below are factors that can contribute to a paralegal’s effectiveness. Indicate which response rating best describes the paralegal’s performance for each factor, using the following scale:

“Consistently Exceeds Expectations” 4 Indicates superior performance that consistently exceeds expectations for the position given the individual's experience. This individual performs well beyond the requirements of the position and is truly exceptional. If this rating is given, there should be written support with specific comments and examples.

“Often Exceeds Expectations” 3 Indicates performance of high quality which often exceeds expectations for the position given the individual's experience. This individual often performs beyond the requirements of the position. If this rating is given, there should be written support with specific comments and examples.
“Meets Expectations”  2  Indicates performance that consistently meets the requirement of the position given the individual’s experience. This rating is used to describe performance that meets the high standards of the legal profession and the firm.

“Improvement Necessary”  1  Indicates performance that requires improvement for the legal assistant to meet expectations for the position given the individual’s experience. Performance with this rating is below that which is normally expected of a paralegal with this individual’s level of experience in this position. If this rating is given, it should be supported with specific examples and comments on how performance is to be improved. It is imperative that agreement is reached on a definite plan of action to rapidly increase the individual’s performance level.

“No Basis”  NB  Used when the evaluating lawyer is unable to form an opinion on the paralegal’s performance on this factor either because the factor does not apply or because of other special circumstances.

A. Technical Skills:

(1) Research
Thorough legal and factual research, cite checking and investigation; Thorough knowledge of state and federal laws; Complete analysis of issues; and Creativity applied when appropriate.

(2) Written communication
Communicates effectively; Persuasive, concise and articulate; Thorough analysis; and Logically organized.
(3) **Oral communication**
*Communicates effectively;*
*Communicates with attorneys proactively;*
*Explains difficult concepts in simple terms; and*
*Persuasive, articulate and decisive.*

(4) **Risk assessment, legal/business judgment**
*Identifies key legal/business issues quickly;*
*Quantifies impact of various outcomes;*
*Focuses on the business objective; and*
*Uses an analytical approach to solve problems.*

(5) **Track record in achieving**
*Follows-through until objective is achieved; and*
*Learns from prior experiences.*

(6) **Expertise**
*Good understanding of industry;*
*Applies business plan to work;*
*Knows client’s business and objectives;*
*Basic understanding in broad areas of law;*
*Competent in area of specialization; and*
*Capable of handling complex issues.*

(7) **Litigation skills**
*Concise and precise in use of words in oral and written form;*
*Articulate and persuasive;*
*Comfortable in varied settings;*
*Conveys a professional image;*
*Prepared, thorough and effective; and*
*Case and time management.*

(8) **Overall technical skills**
*Equal to those of a junior attorney*
B. Client Service:

(1) **Communications**
*Expresses thoughts in clear, organized manner;*  
*Concise and precise in use of words;*  
*Articulate and persuasive;*  
*Comfortable in varied settings; and*  
*Updates clients regularly.*

(2) **Responsive**
*Completes assignments on time;*  
*Returns phone calls promptly; and*  
*Is accessible (work and home).*

(3) **Knowledge of client’s business**
*Knows client’s business plan;*  
*Attends client meetings;*  
*Applies business plan to client’s situation; and*  
*Good operational/technical knowledge.*

(4) **Acceptance by client**
*Relied upon as both legal/business confidant;*  
*Considered integral to client’s success by client;*  
*Respected by client; and*  
*Planning/important decisions made together.*

(5) **Client education**
*Provides direction to clients on a substantive level.*

(6) **Overall client service**
*Equal to those of a junior attorney.*
C. **Professionalism:**

(1) **Legal and business ethics**
*Maintains standard of absolute integrity;*  
*Complies with spirit of law/regulations; and*  
*Accepts no compromise of principles.*

(2) **Attitude**
*Industrious, works consistently at 100%;*  
*Dedicated, motivated, self-reliant;*  
*Efficient, operates with sense of urgency;*  
*Fosters camaraderie and teamwork;*  
*Accepts criticism as an opportunity to grow;*  
*Patient in instruction of others; and*  
*Respected and liked by others.*

D. **Management:**

(1) **Leadership skills**
*Enhances the success of others;*  
*Accepts responsibility for subordinates’ actions;*  
*Supports company quality efforts;*  
*Contributes to administrative tasks;*  
*Sets/achieves professional development goals; and*  
*Educates constantly.*

(2) **Outside counsel, agencies and agents**
*Effectively interacts and manages the information flow with outside counsel, agencies, commissions and court personnel;*  
*Fosters partnering relationships; and*  
*Communicates objectives/needs clearly.*

(3) **Personal management**
*Effectively utilizes time;*  
*Delegates appropriately;*  
*Meets deadlines;*  
*Organization and planning skills;*  
*Works in autonomous fashion; and*  
*Knowledgeable on status of matters.*
E. Technology:

(1) **Literacy**
*Competent with standard software applications used by the company, including basic office suite and communications software;*  
*Uses office technology independently;*  
*Uses on-line research effectively; and*  
*Improves technology skills/knowledge.*

(2) **Portability**
*Uses available technology effectively to serve clients on-site or at remote locations; and*  
*Uses technology to maintain accessibility to clients, law firm personnel and critical information.*

**TOTAL RATING:**

**AVERAGE SCORE:**

What are this paralegal’s particular strengths?

What are this paralegal’s particular weaknesses?
GOAL-SETTING

Performance Goals and Training and Development Plan

Section 1  Performance Goals

Section 2  Training and Development Plan

Areas for Improvement and a Plan of Action

Section 1  Identify areas needing improvement
Section 2  Action plan for improvement

Are there any recommendations that you feel should now be conveyed to this paralegal in his/her annual review or specific recommendations you would make to assist this paralegal?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

General Comments:
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

Evaluator’s Signature:  
Date:  

Employee’s Signature:  
Date:  

Supervisor’s Signature:  
Date:  