**PERFORMANCE EVALUATION FORM**

**Management Staff**

**Employee Name:** **Supervisor Name:**

**Classification/Title:** **Department:**

**Date of Evaluation:** **Review Period:** to

**Evaluation:** [ ] 3 months [ ]  6 months [ ]  Annual

**PROCEDURE**

1. Employee and Supervisor review position description.

[ ]  Position description reviewed, no change [ ]  Updated position description attached

1. Employee completes “Self-Evaluation” section by rating performance in each of the performance standard areas, as well as the goal section.  **If employee rates “self” as “Exceeds Expectations” employee must provide comments supporting the self-rating.** Employee emails document to supervisor.
2. Supervisor completes “Supervisor” section of the evaluation form, and evaluates “Goals” section. **If supervisor rates employee as “Exceeds Expectations,” “Needs Improvement” or “Unacceptable,” supervisor must provide comments supporting the rating.**
3. Supervisor meets with employee to conduct employee evaluation. Supervisor and Employee sign evaluation document and forwards to HR for filing. Supervisor sends evaluation to the next level supervisor for review and signature **only if employee is “in need of improvement” or receives “unacceptable” review**.

**RATINGS DEFINTIONS**

**EXCEEDS EXPECTATIONS (4):** Consistently meets and often exceeds all relevant performance standards. Shows initiative and versatility, works collaboratively, has strong technical & interpersonal skills or has achieved significant improvement in these areas. Fully satisfies the requirements and expectations of the job function noted. Goals and objectives, expected results and/or special assignments are achieved.

**SOMETIMES EXCEEDS EXPECTATIONS (3):** Regularly meets and sometimes exceeds all relevant performance standards. Shows initiative and versatility, works collaboratively, has strong technical & interpersonal skills or has achieved significant improvement in these areas. Frequently satisfies the requirements and expectations of the job function noted. Goals and objectives, expected results and/or special assignments are achieved.

**MEETS EXPECTATIONS (2):** Regularly meets all relevant performance standards. Satisfies many of the requirements and expectation of the job function noted. Developing appropriate level of skills or is inexperienced/still learning the scope of the job.

**NEEDS IMPROVEMENT (1):** Sometimes meets the performance standards. Seldom exceeds or falls short of desired results. Employee needs to improve on standard(s) established for the job function noted. Work may be of variable quality or inconsistent with standards set for job function. **Must complete comments section.**

**UNSATISFACTORY (0):** Consistently fails to meet performance standards established for the job function. Significant performance improvement and/or corrective action is necessary. Goals and objectives are not achieved. **Must complete comments section.**

**Essential Job Functions and Responsibilities**

A position’s essential job functions and responsibilities can be found in the position description. Please list each major function in the numbered boxes below, and indicate level of performance.

|  |
| --- |
| 1. Job Function

         Level of Performance: [ ]  Exceeds Expectations [ ]  Meets Expectations [ ]  Needs Improvement [ ]  Unsatisfactory Identify accomplishments during the review period:       Identify areas for improvement:        |
| 1. Job Function

         Level of Performance: [ ]  Exceeds Expectations [ ]  Meets Expectations [ ]  Needs Improvement [ ]  Unsatisfactory Identify accomplishments during the review period:       Identify areas for improvement:        |
| 1. Job Function

         Level of Performance: [ ]  Exceeds Expectations [ ]  Meets Expectations [ ]  Needs Improvement [ ]  Unsatisfactory Identify accomplishments during the review period:       Identify areas for improvement:        |

**PERFORMANCE COMPETENCIES**

|  |
| --- |
| **Adaptability/Flexibility:** Adjusts performance to accommodate changes in departmental direction and processes. Adapts to changing responsibilities. Responds appropriately to constructive criticism and to suggestions for work improvement. |
| [ ] Self-Evaluation | [ ] Self-Evaluation | [ ] Self-Evaluation | [ ] Self-Evaluation |  [ ] Self-Evaluation |
| **Exceeds Expectations** | **Sometimes Exceeds Expectations** | **Meets Expectations** | **Needs Improvement**(**Must complete comments section)** | **Unsatisfactory**(**Must complete comments section)** |
| [ ] Manager-Evaluation | [ ] Manager-Evaluation | [ ] Manager-Evaluation | [ ] Manager-Evaluation | [ ] Manager-Evaluation |
| Consistently meets and often exceeds all relevant performance standards. Shows initiative and versatility, works collaboratively, has strong technical & interpersonal skills or has achieved significant improvement in these areas. Fully satisfies the requirements and expectations of the job function noted. Goals and objectives, expected results and/or special assignments are achieved. | Regularly meets and sometimes exceeds all relevant performance standards. Shows initiative and versatility, works collaboratively, has strong technical & interpersonal skills or has achieved significant improvement in these areas. Frequently satisfies the requirements and expectations of the job function noted. Goals and objectives, expected results and/or special assignments are achieved. | Regularly meets all relevant performance standards. Satisfies many of the requirements and expectation of the job function noted. Developing appropriate level of skills or is inexperienced/still learning the scope of the job. | Sometimes meets the performance standards. Seldom exceeds or falls short of desired results. Employee needs to improve on standard(s) established for the job function noted. Work may be of variable quality or inconsistent with standards set for job function.  | Consistently fails to meet performance standards established for the job function. Significant performance improvement and/or corrective action is necessary. Goals and objectives are not achieved. |
| **Employee Comments:**  | **Supervisor Comments:** |
| **Collaboration/Teamwork:** Explores and suggests new approaches and methods to affect departmental goals and responsibilities.  |
| [ ] Self-Evaluation | [ ] Self-Evaluation | [ ] Self-Evaluation | [ ] Self-Evaluation |  [ ] Self-Evaluation |
| **Exceeds Expectations** | **Sometimes Exceeds Expectations** | **Meets Expectations** | **Needs Improvement**(**Must complete comments section)** | **Unsatisfactory**(**Must complete comments section)** |
| [ ] Manager-Evaluation | [ ] Manager-Evaluation | [ ] Manager-Evaluation | [ ] Manager-Evaluation | [ ] Manager-Evaluation |
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| **Employee Comments:** | **Supervisor Comments:** |
| **Communication:** Timely communication with styles that are approachable and respectable. Listens carefully to others. Proactive and thorough in determining who needs information and works to keep them informed. |
| [ ] Self-Evaluation | [ ] Self-Evaluation | [ ] Self-Evaluation | [ ] Self-Evaluation |  [ ] Self-Evaluation |
| **Exceeds Expectations** | **Sometimes Exceeds Expectations** | **Meets Expectations** | **Needs Improvement**(**Must complete comments section**  | **Unsatisfactory**(**Must complete comments section)** |
| [ ] Manager-Evaluation | [ ] Manager-Evaluation | [ ] Manager-Evaluation | [ ] Manager-Evaluation | [ ] Manager-Evaluation |
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| **Employee Comments:**       | **Employee Comments:** |
| **Creativity/Innovation:** Explores and suggests new approaches and methods to affect departmental goals and responsibilities. |
| [ ] Self-Evaluation | [ ] Self-Evaluation | [ ] Self-Evaluation | [ ] Self-Evaluation |  [ ] Self-Evaluation |
| **Exceeds Expectations** | **Sometimes Exceeds Expectations** | **Meets Expectations** | **Needs Improvement**(**Must complete comments section)** | **Unsatisfactory**(**Must complete comments section)** |
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| **Employee Comments:**       | **Supervisor Comments:** |
| **Customer Focus:** Engage in all job-related interactions and activities with contact from within and outside the University in a courteous and professional manner. Focuses on meeting customer needs and follows up until questions are answered or problems are resolved. |
| [ ] Self-Evaluation | [ ] Self-Evaluation | [ ] Self-Evaluation | [ ] Self-Evaluation |  [ ] Self-Evaluation |
| **Exceeds Expectations** | **Sometimes Exceeds Expectations** | **Meets Expectations** | **Needs Improvement**(**Must complete comments section)** | **Unsatisfactory**(**Must complete comments section)** |
| [ ] Manager-Evaluation | [ ] Manager-Evaluation | [ ] Manager-Evaluation | [ ] Manager-Evaluation | [ ] Manager-Evaluation |
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| **Employee Comments:**       | **Supervisor Comments:** |
| **Dependability/Reliability:** Consistently carries out assignments with minimal supervision. Exercises follow-through and adheres to time frames. Responds appropriately to instructions and procedures. |
| [ ] Self-Evaluation | [ ] Self-Evaluation | [ ] Self-Evaluation | [ ] Self-Evaluation |  [ ] Self-Evaluation |
| **Exceeds Expectations** | **Sometimes Exceeds Expectations** | **Meets Expectations** | **Needs Improvement**(**Must complete comments section)** | **Unsatisfactory**(**Must complete comments section)** |
| [ ] Manager-Evaluation | [ ] Manager-Evaluation | [ ] Manager-Evaluation | [ ] Manager-Evaluation | [ ] Manager-Evaluation |
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| **Employee Comments:**       | **Supervisor Comments:** |
| **Ethics & Integrity:**  Maintains a high level of character and professional attitude. Earns others’ trust and respect through consistent honesty and professionalism in all interactions. Can conform and promote the University’s Standards of Conduct. |
| [ ] Self-Evaluation | [ ] Self-Evaluation | [ ] Self-Evaluation | [ ] Self-Evaluation |  [ ] Self-Evaluation |
| **Exceeds Expectations** | **Sometimes Exceeds Expectations** | **Meets Expectations** | **Needs Improvement**(**Must complete comments section)** | **Unsatisfactory**(**Must complete comments section)** |
| [ ] Manager-Evaluation | [ ] Manager-Evaluation | [ ] Manager-Evaluation | [ ] Manager-Evaluation | [ ] Manager-Evaluation |
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| **Employee Comments:**       | **Supervisor Comments:** |
| **Initiative:**  Demonstrates leadership and resourcefulness, performs tasks independently and assumes responsibility for completed tasks. Demonstrates a sense of urgency when completing tasks and takes effective action without explicit direction from supervisor. |
| [ ] Self-Evaluation | [ ] Self-Evaluation | [ ] Self-Evaluation | [ ] Self-Evaluation |  [ ] Self-Evaluation |
| **Exceeds Expectations** | **Sometimes Exceeds Expectations** | **Meets Expectations** | **Needs Improvement**(**Must complete comments section)** | **Unsatisfactory**(**Must complete comments section)** |
| [ ] Manager-Evaluation | [ ] Manager-Evaluation | [ ] Manager-Evaluation | [ ] Manager-Evaluation | [ ] Manager-Evaluation |
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| **Employee Comments:**       | **Supervisor Comments:** |
| **Interpersonal Relations:** Shows respect for individual differences. Demonstrates behaviors that embrace diversity. Creates an environment of learning about, valuing, encouraging and supporting differences. Is approachable and accessible; promotes cooperation. Deals maturely, discreetly, and directly with conflict. |
| [ ] Self-Evaluation | [ ] Self-Evaluation | [ ] Self-Evaluation | [ ] Self-Evaluation |  [ ] Self-Evaluation |
| **Exceeds Expectations** | **Sometimes Exceeds Expectations** | **Meets Expectations** | **Needs Improvement**(**Must complete comments section)** | **Unsatisfactory**(**Must complete comments section)** |
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| **Employee Comments:**       | **Supervisor Comments:** |
| **Job Knowledge/Acumen:** Demonstrates expertise in the functional aspects of the job. Continues to learn new skills and seeks new knowledge to improve expertise. |
| [ ] Self-Evaluation | [ ] Self-Evaluation | [ ] Self-Evaluation | [ ] Self-Evaluation |  [ ] Self-Evaluation |
| **Exceeds Expectations** | **Sometimes Exceeds Expectations** | **Meets Expectations** | **Needs Improvement**(**Must complete comments section)** | **Unsatisfactory**(**Must complete comments section)** |
| [ ] Manager-Evaluation | [ ] Manager-Evaluation | [ ] Manager-Evaluation | [ ] Manager-Evaluation | [ ] Manager-Evaluation |
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| **Employee Comments:**       | **Supervisor Comments:** |
| **Judgment:** Considers how well employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action. |
| [ ] Self-Evaluation | [ ] Self-Evaluation | [ ] Self-Evaluation | [ ] Self-Evaluation |  [ ] Self-Evaluation |
| **Exceeds Expectations** | **Sometimes Exceeds Expectations** | **Meets Expectations** | **Needs Improvement**(**Must complete comments section)** | **Unsatisfactory**(**Must complete comments section)** |
| [ ] Manager-Evaluation | [ ] Manager-Evaluation | [ ] Manager-Evaluation | [ ] Manager-Evaluation | [ ] Manager-Evaluation |
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| **Employee Comments:**       | **Supervisor Comments:** |
| **Leadership:** Works cooperatively with others to achieve common goals. Participates in building group identity characterized by pride, trust, and commitment. |
| [ ] Self-Evaluation | [ ] Self-Evaluation | [ ] Self-Evaluation | [ ] Self-Evaluation |  [ ] Self-Evaluation |
| **Exceeds Expectations** | **Sometimes Exceeds Expectations** | **Meets Expectations** | **Needs Improvement**(**Must complete comments section)** | **Unsatisfactory**(**Must complete comments section)** |
| [ ] Manager-Evaluation | [ ] Manager-Evaluation | [ ] Manager-Evaluation | [ ] Manager-Evaluation | [ ] Manager-Evaluation |
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| **Employee Comments:**       | **Supervisor Comments:** |
| **Problem solving:** Resolves difficult or complicated challenges. |
| [ ] Self-Evaluation | [ ] Self-Evaluation | [ ] Self-Evaluation | [ ] Self-Evaluation |  [ ] Self-Evaluation |
| **Exceeds Expectations** | **Sometimes Exceeds Expectations** | **Meets Expectations** | **Needs Improvement**(**Must complete comments section)** | **Unsatisfactory**(**Must complete comments section)** |
| [ ] Manager-Evaluation | [ ] Manager-Evaluation | [ ] Manager-Evaluation | [ ] Manager-Evaluation | [ ] Manager-Evaluation |
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| **Employee Comments:**       | **Supervisor Comments:** |

COMPLIANCE, TRAINING AND DEVELOPMENT

Has met all required compliance standards for the evaluation period?

[ ]  Yes [ ]  No

Has met all mandatory training requirements for the evaluation period?

[ ]  Yes [ ]  No

|  |
| --- |
| Please list all of the voluntary training and/or professional development opportunities achieved for the evaluation period:      |

GOALS FOR LAST REVIEW PERIOD

|  |
| --- |
| Goal #1:      [ ]  Met goal during performance period [ ]  Did not meet goal during performance periodComments:       |

|  |
| --- |
| Goals #2:      [ ]  Met goal during performance period [ ]  Did not meet goal during performance periodComments:       |

|  |
| --- |
| Goal #3:      [ ]  Met goal during performance period [ ]  Did not meet goal during performance periodComments:       |

This section to be completed if employee is identified as in need of improvement. (A performance improvement plan (PIP) may be instituted to help employee meet performance expectations).

AREAS FOR DEVELOPMENT

|  |
| --- |
| #1. **#2.****#3.** |

*By signing below, I attest that my supervisor has discussed the performance evaluation with me, and I have had the opportunity to respond (Employee’s signature does not indicate agreement, but attests that the employee has had the opportunity to reach and discuss the review with his or her immediate supervisor).*

Employee Signature Date

Supervisor Signature Date

Next Level Supervisor Signature Date