**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 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.**

**SECTION 1: GOALS FOR REVIEW PERIOD**

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| --- |
| Goal #1:  Met goal during performance period  Did not meet goal during performance period  Comments: |

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| Goals #2:  Met goal during performance period  Did not meet goal during performance period  Comments: |

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| --- |
| Goal#3:  Met goal during performance period  Did not meet goal during performance period  Comments: |

**SECTION 2: 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 Choose a Rating** | **Supervisor Evaluation Choose a Rating** |
| **Employee Comments:** | **Supervisor Comments:**  **Rating #**: |
| **Collaboration/Teamwork:** Works well with others. Demonstrates the ability to effectively resolve differences when interacting with team members. Fosters collegiality and team spirit. | |
| **Self Evaluation Choose a Rating** | **Supervisor Evaluation Choose a Rating** |
| **Employee Comments:** | **Supervisor Comments:**  **Rating #**: |
| **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 Choose a Rating** | **Supervisor Evaluation Choose a Rating**  **Rating #**: |
| **Employee Comments:** | **Supervisor Comments:** |
| **Creativity/Innovation:** Explores and suggests new approaches and methods to affect departmental goals and responsibilities. | |
| **Self Evaluation Choose a Rating** | **Supervisor Evaluation Choose a Rating**  **Rating #**: |
| **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 Choose a Rating** | **Supervisor Evaluation Choose a Rating**  **Rating #**: |
| **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 Choose a Rating** | **Supervisor Evaluation Choose a Rating**  **Rating #**: |
| **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 Choose a Rating** | **Supervisor Evaluation Choose a Rating**  **Rating #**: |
| **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 Choose a Rating** | **Supervisor Evaluation Choose a Rating**  **Rating #**: |
| **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 Choose a Rating** | **Supervisor Evaluation Choose a Rating**  **Rating #**: |
| **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 Choose a Rating** | **Supervisor Evaluation Choose a Rating**  **Rating #**: |
| **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 Choose a Rating** | **Supervisor Evaluation Choose a Rating**  **Rating #**: |
| **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 Choose a Rating** | **Supervisor Evaluation Choose a Rating**  **Rating #**: |
| **Employee Comments:** | **Supervisor Comments:** |
| **Problem solving:** Resolves difficult or complicated challenges. | |
| **Self Evaluation Choose a Rating** | **Supervisor Evaluation Choose a Rating**  **Rating #**: |
| **Employee Comments:** | **Supervisor Comments:** |

**SECTION 3: DEPARTMENT SPECIFIC COMPETENCIES**

**This section should be used to add department specific competencies that you would like to assess. These scores will be include in the overall score.**

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|  | |
| **Self Evaluation Choose a Rating** | **Supervisor Evaluation Choose a Rating** |
| **Employee Comments:** | **Supervisor Comments:**  **Rating #:** |
|  | |
| **Self Evaluation Choose a Rating** | **Supervisor Evaluation Choose a Rating** |
| **Employee Comments:** | **Supervisor Comments:**  **Rating #:** |
|  | |
| **Self Evaluation Choose a Rating** | **Supervisor Evaluation Choose a Rating** |
| **Employee Comments:** | **Supervisor Comments:**  **Rating #:** |

**SECTION 4: 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: |

**SECTION 5: OVERALL RATING AND SIGNATURE**

An overall score of “2” or higher is deemed to have met expectations.  **An overall rating of less than “2” is deemed not to have met expectations.** If employee has not met expectations, a formal performance improvement plan must be implemented. Contact HR to begin process.

**Has Met  Has Not Met Overall Score**      /=      

*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 read and discuss the review with his or her immediate supervisor).*

     

Employee (Printed Name) and Signature Date

     

Supervisor (Printed Name) and Signature Date

     

Next Level Supervisor (Printed Name) and Signature (as necessary) Date