Performance Evaluation Summary

<table>
<thead>
<tr>
<th>Staff Name:</th>
<th>Performance Period:</th>
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<td>Position:</td>
<td>Department:</td>
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The following pages list various categories in which the supervisor will evaluate the staff member’s performance during the previous year and provide an explanation for each category. The primary purpose of a performance evaluation is to stimulate communication and help the supervisor and staff member discuss the level of performance associated with their duties and responsibilities. The numbers indicate the extent to which this person uses these skills or demonstrates these characteristics.

Please follow the instructions below to complete the form.

**Step 1:**
Identify critical job competencies which relate to the staff member’s quality/quantity of work, communication, customer service, work habits and supervisor abilities. You may use some or all of the competencies listed on the form. If the listed competency is not appropriate replace it with the appropriate job competency.

**Step 2:**
Circle the rating which best demonstrates the staff member’s performance of the competency.

**Step 3:**
(For Leaders only) Under the goals section, list and discuss with your supervisor goals to be achieved during the year. (See P.M. handbook for tips on how to write goals)

The explanation and recommendations section should be used to explain ratings, work priorities and requirements needed in the future to enhance the rating(s).

1 = Unsatisfactory: Fails to meet minimum expectations for the position.
2 = Needs Development: Meets minimum job expectations but needs further training and/or improvement.
3 = Meets Position Expectations: Consistently displays competent, effective performance.
4 = Above Expectations: Consistently exceeds expectations for most major accountabilities and meets others.
5 = Outstanding: Consistently makes significant contributions above and beyond position expectations.

1. **Quality/Quantity of Work:**

   ° Consistently completes work in a timely manner that is accurate, thorough, and neat.  
     1 2 3 4 5

   ° Produces quantity of work assigned to the position.  
     1 2 3 4 5

   ° Possesses skills necessary to perform expectations of position.  
     1 2 3 4 5

   ° Adapts to new technology as necessary.  
     1 2 3 4 5

   **Explanation and Recommendation:**

2. **Communication:**

   ° Communicates well with faculty, staff, students, and outside constituencies, listening carefully and responding appropriately.  
     1 2 3 4 5
° Works well with other members of department. Willingly shares ideas and is able to compromise when necessary. 1 2 3 4 5
° Is appropriately discreet in conduct and understands when confidentiality is needed. 1 2 3 4 5

Explanation and Recommendation:

3. Customer Service:

° Displays a positive attitude in dealings with customers, staff, faculty, and students. 1 2 3 4 5
° Is courteous and tactful both in telephone conversations and in person. 1 2 3 4 5
° Demonstrates flexibility with customers (clients) and other staff by considering alternative solutions to problems presented. 1 2 3 4 5

Explanation and Recommendation:

4. Work Habits:

° Effectively plans and organizes work assigned so it is completed without excessive instruction or supervision. 1 2 3 4 5
° Recognizes potential problems and promptly informs supervisor. 1 2 3 4 5
° Formulates alternative solutions to problems. 1 2 3 4 5
° Has knowledge of all jobs in the department. 1 2 3 4 5
° Is willing to ask questions when not fully understanding the job to be done. 1 2 3 4 5
° Willingly adapts to new or changed situations 1 2 3 4 5
° Is committed to completing the task at hand by deadlines set. Makes effort to overcome obstacles. 1 2 3 4 5
° Attends work as scheduled and informs supervisor of absences in advance. 1 2 3 4 5
° Accepts additional responsibility when asked. 1 2 3 4 5
° Consistently exercises good judgment in analyzing work situations and draws sound conclusions. 1 2 3 4 5
5. **Supervisory Abilities (if applicable):**

   ° Communicates effectively and listens to concerns and ideas of others. States views concisely and logically when speaking or writing.  
   
   ° Uses financial resources wisely and efficiently.  
   
   ° Develops, implements, and completes short and long-term plans for the department.  
   
   ° Creates environment of fairness and trust among co-workers; maintaining good, cooperative working relationships.  
   
   ° Displays good leadership abilities which inspire top performance from those he/she supervises.  
   
   ° Exercises good judgment in analyzing work situations and deals with these situations in an effective manner.

6. **Leadership Goals (if applicable):**
   (Goals should have been discussed at beginning of evaluation year)

   1. _________________________________________________________________  
   
   2. _________________________________________________________________  
   
   3. _________________________________________________________________  
   
   4. _________________________________________________________________  
   
   5. _________________________________________________________________  

   Explanation and Recommendation:
Overall evaluation summary: The following rating definitions have been established to provide an equitable evaluation process to improve communication; define performance expectations; improve job productivity; and summarize job performance.

**Overall Performance Rating**

- **Outstanding**: Performs at a level of exceptional accomplishment. Consistently makes significant contributions, going above and beyond position expectations.
- **Above Expectations**: Consistently performs at a level that meets and often exceeds expectations of the position.
- **Meets Expectations**: Adequate performance. Consistently displays competent and effective performance that meets the basic expectations of the position.
- **Needs Development**: Meets minimum job expectations, but needs improvement in key areas of accountability.
- **Unsatisfactory**: Fails to meet minimum expectations; needs immediate and effective attention.

**OVERALL EVALUATION RATING ___**

**Supervisor’s Comments:**

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

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7. **Goals for Upcoming Year**: Determine goals to be attained within upcoming evaluation year.

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8. **Staff Member’s Comments: (Optional)**

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________________________________________________________________________

________________________________________________________________________

Supervisor’s signature ____________________________ Date ______

Staff Member’s signature ____________________________ Date ______

(My signature does not necessarily imply agreement but verifies that I have read and discussed this review with my supervisor.)