

Performance Appraisal

revised 5/06

NAME:

DATE:

POSITION (TITLE):

DEPARTMENT:

ANNIVERSARY DATE:

TYPE OF REVIEW: Annual Special 90-Day Review

STATUS OF EMPLOYEE'S JOB DESCRIPTION

(Check Appropriate Box - **required**) Current Needs Revision**

JOB PERFORMANCE AND DEVELOPMENTAL FACTORS

The annual evaluation consists of the following components:

Considering only the period covered by this report, the supervisor will write specific comments related to each section of the appraisal. Please note that there is an additional **summary of performance** section at the end of the appraisal that will highlight overall areas of strength and specify strategies and commitments for required areas of improvement and/or priority areas for development. Careful attention must be paid to this section and action plans must include sufficient details to provide a basis for review in future evaluations.

Also included is a section related to **professional development**. This section should include comments related to the individual employee's professional goals and any specific training or development needs related to this goal.

*In addition to the items on this form, performance evaluation for department heads should include a review of up to five **key goals** for the year, as related to planned departmental accomplishments, changes, etc. This should be provided as an attachment to the review form. (Note: The departmental goals should dovetail with the department's annual report, but may include more personal observations from the administrator on steps needed to achieve those goals.)*

To get the most open two-way communications, it is recommended that supervisors have each staff member use this instrument to complete a self appraisal, prior to meeting with the supervisor for completion of the final evaluation.

****IMPORTANT:** *The job description must be carefully reviewed to ensure it is still current. If it needs revision, the department head should initiate the process. Contact Human Resources for paperwork and the proper procedure. If the supervisor or employee feels there is a general lack of clarity in the job description, it should be revised or clarified.*

APPRAISAL COMMENT DESCRIPTION

If the individual has not been in the position long enough to evaluate performance due to insufficient time on the job or if a particular skill doesn't apply to the position, an **N/A** should be inserted, and the reason given. Since detail is important, the space on the form may not be adequate for some answers. Supervisors are encouraged either to use the form as a template for word-processing, or to attach a separate document if necessary.

AREAS OF STRENGTH: Comments should include objective detail related to skills and specific performance that positively contribute to the employee's role in the position, should support essential duties of the current job description, and should pull in items from the previous year's appraisal. Attach a separate document if necessary.

AREAS OF DEVELOPMENT: There always is room for growth and improvement in even the best employee. The items noted should include suggested professional development, as well as any areas where improvement is needed in order to succeed in the current job. Be sure to consider each section and how an individual can improve or learn new skills beneficial to growth in the position and address the new challenges that will be inevitable over time even if he/she stay in the same position.

PART 1 – ASSESSMENT OF PERFORMANCE ON KEY FACTORS (Factors 1-5 Apply to all employees)

1) QUALITY/QUANTITY OF WORK:

Consider quality and quantity of work produced in relation to high standards, neatness, close attention to detail, compliance with work instructions.

STRENGTHS:

AREAS OF DEVELOPMENT:

2) JOB KNOWLEDGE/SKILLS:

Consider understanding of responsibilities, techniques, methods, and authority; knowledge and skills required to perform job; commitment to updating skills and knowledge.

STRENGTHS:

AREAS OF DEVELOPMENT:

3) RELIABILITY/PRODUCTIVITY/TIME MANAGEMENT AND DEPENDABILITY:

Consider performance in carrying out instructions; adhering to work schedules and completing assignments on time; attendance; accepting responsibility; balancing conflicting demands as needed to accomplish key priorities.

STRENGTHS:

AREAS OF DEVELOPMENT:

4) COMMUNICATION/INTERPERSONAL RELATIONSHIPS AND PERSONAL CHARACTERISTICS:

Consider performance in getting along well with others and treating them with dignity; upholding a high standard of professional service; demonstrating a positive and collaborative attitude working with students, co-workers, supervisors, and others; communicating orally and in writing as appropriate to the position. Include any and all traits that are directly in line with our mission and core values, and that support our customer service culture (be specific). Include an assessment of the extent to which the employee's appearance and conduct meet the requirements of the job.

STRENGTHS:

AREAS OF DEVELOPMENT:

5) INITIATIVE, PROBLEM SOLVING/DECISION MAKING AND RESOURCEFULNESS

Consider whether independent action appropriate to job is taken; approach to work is with a high degree of creativity; innovation and practical considerations are balanced in planning actions, setting and achieving goals; win-win solutions to issues and conflicts are sought; sound decisions are made.

STRENGTHS:

AREAS OF DEVELOPMENT:

PART 2 - Factors 6-10 APPLY ONLY TO ADMINISTRATORS, SPECIFICALLY THOSE WHO SUPERVISE THE WORK OF OTHERS AND/OR MANAGE BUDGETS. IF AN AREA IS NOT APPLICABLE, PLEASE INDICATE THAT FACT.

6) MANAGEMENT PRINCIPLES AND LEADERSHIP:

Consider effectiveness in planning, organizing, delegating, coordinating, and general oversight. Consider the extent to which an environment conducive to team-building and effective collaboration is fostered with subordinates and colleagues.

STRENGTHS:

AREAS OF DEVELOPMENT:

7) DEVELOPMENT/EVALUATION OF SUBORDINATES:

Consider performance in counseling, developing and evaluating subordinates; completing appraisals in a manner that ensures each employee understands his/her strengths and areas needing development; encouraging and showing willingness to release subordinates for developmental opportunities; encouraging consistent improvement in employee skills and knowledge; ensuring that follow-up action is taken when employee performance is not acceptable.

STRENGTHS:

AREAS OF DEVELOPMENT:

8) COMMITMENT TO AFFIRMATIVE ACTION:

Consider the extent to which affirmative action in employment, development and advancement of protected classes is taken.

STRENGTHS:

AREAS OF DEVELOPMENT:

9) FISCAL RESPONSIBILITY:

Consider the extent to which budget and resources are responsibly handled with good planning, prudent decision making and careful monitoring.

STRENGTHS:

AREAS OF DEVELOPMENT:

10) ACCOUNTABILITY FOR DEVELOPMENT / ACHIEVEMENT OF DEPARTMENTAL GOALS:

Consider the extent to which departmental goals and measures of performance are regularly established and departmental performance is assessed against goals.

STRENGTHS:

AREAS OF DEVELOPMENT:

PART 3 - SUMMARY OF OVERALL PERFORMANCE (Required for all employees)

It is **expected** that this section will be completed with details highlighting the knowledge, skills and abilities that are most significant to one's overall performance. Because everyone can increase skills or improve in some manner, be sure to assist each employee to further develop and grow in his/her position by giving objective and detailed feedback in this area.

STRENGTHS:

PRIORITY AREAS OF DEVELOPMENT/IMPROVEMENT:

ACTIONS?

WHO WILL INITIATE?

WHEN?

PART 4 - PROGRESS SINCE LAST EVALUATION

Taking into account development plans or improvement needs identified in the last evaluation, indicate actions and changes that have taken place.

Development Area:

Actions/Changes since last evaluation:

Development Area:

Actions/Changes since last evaluation:

Development Area:

Actions/Changes since last evaluation:

PART 5 – PROFESSIONAL DEVELOPMENT INTERESTS/GOALS

Since the University values the pursuit of knowledge and excellence, it is important to be aware of employee interests and goals in terms of professional development that may be needed to grow in the current position and/or advance to other positions. Include any further education or development of skills that may be needed in order to move toward goals.

PART 6 - EMPLOYEE COMMENTS AND SIGNATURES

This part must be completed by the employee. **Should the employee want the written self-appraisal to be part of the formal evaluation record, it can be attached as a replacement for this comment section.**

Comments:

Information required from employees on all forms:

I have read and understand the contents of the review.

I agree with this review

or

I disagree for the following reasons:

Employee Signature _____

Date _____

Supervisor's Signature _____

Date _____

Dean/Department Head Signature _____

Date _____

Functional Officer Signature _____

Date _____

Director of Human Resources _____

Date _____

Should the employee want to attach his/her own comments, he/she can attach additional pages, if necessary.