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| --- | --- | --- | --- |
| **Employee Name:** | **Department:** | **Evaluation Period:** | **Type of Evaluation:** |
| First and Last Name | Department Name |       to       | [ ]  | 6 Month (New) |
| **Classification:** | **Working Title:** |[ ]  Annual |
| Classification | Job Title |[ ]  Probationary: Report |
|  |  |[ ]  Other: Please explain |
| **Evaluation Date:**       |
| **RATING CRITERIA** |
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| **Exceeds Expectations:** | Performance in this area often exceeds expectations and requirements of the position. |
| **Achieves Expectations:** | Performance meets and occasionally may exceed expectations and requirements of the position. Work is fully satisfactory. *This represents the expected level of performance*. |
| **Needs Improvement:** | Performance in this area often does not meet expectations and requirements of the position. Improvement is necessary. |

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| **INSTRUCTIONS**:This form is to be used to evaluate Confidential employees. Evaluations are conducted annually. An evaluator wishing to evaluate an employee more often should check the “Other” box under Type of Evaluation. Provide examples to document ratings. **Attach additional sheets if needed.** Record the overall performance in the section titled “Overall Evaluation”, taking into account all factors and total performance over the period being evaluated. The “Overall Evaluation” should ***not*** be viewed as an average of all areas rated since the value applied to the factor(s) may vary depending on the duties assigned to the position. |
|  |
|  | **Needs Improvement** | **Achieves****Expectations** | **Exceeds****Expectations** |
| **JOB KNOWLEDGE/FUNCTIONAL & TECHNICAL SKILLS** |
| Has achieved required level of knowledge and skills in position-related areas | [ ]  | [ ]  | [ ]  |
| Applies knowledge and skills to meet job requirements | [ ]  | [ ]  | [ ]  |
| Keeps up to date in all relevant knowledge and skills areas to meet job requirements | [ ]  | [ ]  | [ ]  |
| **Comments:**       |
| **SERVICE ORIENTATION** |
| Actively seeks information to understand customers’ circumstances, problems, needs, and expectations | [ ]  | [ ]  | [ ]  |
| Shares information with customers to build their understanding of issues and capabilities | [ ]  | [ ]  | [ ]  |
| Responds quickly to meet customer needs and resolve problems | [ ]  | [ ]  | [ ]  |
| Seeks opportunities to improve services to meet customer needs | [ ]  | [ ]  | [ ]  |
| **Comments:**       |
| **INTERPERSONAL COMMUNICATION** |
| Relates well to all people – internally and externally to the department/division/campus | [ ]  | [ ]  | [ ]  |
| Establishes rapport; builds and maintains effective working relationships | [ ]  | [ ]  | [ ]  |
| Practices attentive and active listening | [ ]  | [ ]  | [ ]  |
| Uses diplomacy and tact; can diffuse high-tension situations comfortably | [ ]  | [ ]  | [ ]  |
| **Comments:**       |
| **INITIATING ACTION** |
| Readily takes action consistent with department objectives | [ ]  | [ ]  | [ ]  |
| Looks for and takes advantage of opportunities to act beyond what is required | [ ]  | [ ]  | [ ]  |
| Takes independent actions when appropriate | [ ]  | [ ]  | [ ]  |
| Volunteers readily | [ ]  | [ ]  | [ ]  |
| Suggests methods and procedures to improve departmental operation | [ ]  | [ ]  | [ ]  |
| **Comments:**       |
| **ORGANIZING AND PLANNING** |
| Prioritizes multiple activities and assignments effectively and adjusts as appropriate | [ ]  | [ ]  | [ ]  |
| Determines tasks and secures appropriate resources to get things done | [ ]  | [ ]  | [ ]  |
| Uses time effectively and stays focused to ensure work is completed | [ ]  | [ ]  | [ ]  |
| Meets commitments and deadlines consistently | [ ]  | [ ]  | [ ]  |
| **Comments:**       |
| **QUALITY OF WORK** |
| Accurately and carefully follows process/procedures for completing work | [ ]  | [ ]  | [ ]  |
| Ensures a high-quality output of work (resulting in minimal acceptable/zero errors) | [ ]  | [ ]  | [ ]  |
| Attentive to all details and aspects of a job or process to ensure a complete, high-quality output | [ ]  | [ ]  | [ ]  |
| **Comments:**       |
| **WORK HABITS** |
| Conducts work within the established (and accepted) department/division practices | [ ]  | [ ]  | [ ]  |
| Conducts work according to the established and approved work schedule | [ ]  | [ ]  | [ ]  |
| Demonstrates professionalism and workplace etiquette | [ ]  | [ ]  | [ ]  |
| **Comments:**       |
| **DECISION MAKING** |
| Identifies issues, problems and opportunities and determines that action is needed | [ ]  | [ ]  | [ ]  |
| Probes all relevant sources to better understand problem, issue or opportunities | [ ]  | [ ]  | [ ]  |
| Analyzes information and generates options for addressing issue, problem or opportunity | [ ]  | [ ]  | [ ]  |
| Chooses appropriate action by evaluating options and considering implications in a timely manner | [ ]  | [ ]  | [ ]  |
| Involves others as needed to ensure quality and commitment of decision | [ ]  | [ ]  | [ ]  |
| **Comments:**       |
| **COMPOSURE** |
| Maintains effective performance under pressure | [ ]  | [ ]  | [ ]  |
| Copes effectively and develops effective approaches to deal with pressure or stress | [ ]  | [ ]  | [ ]  |
| Presents a positive disposition and maintains constructive interpersonal relationships when under stress | [ ]  | [ ]  | [ ]  |
| **Comments:**       |
| **WORKING WITH OTHERS** |
| Works well with others to achieve higher performance | [ ]  | [ ]  | [ ]  |
| Treats others with dignity, respect, and fairness | [ ]  | [ ]  | [ ]  |
| Creates a climate in which employees want to do their best | [ ]  | [ ]  | [ ]  |
| Serves as a positive role model | [ ]  | [ ]  | [ ]  |
| Operates with integrity, honesty, and courage | [ ]  | [ ]  | [ ]  |
| **Comments:**       |

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| **GOALS AND OBJECTIVES FROM THIS EVALUATION PERIOD** |

Discuss progress toward achievement of goals set for the past evaluation period.

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| **GOALS AND OBJECTIVES FOR NEXT EVALUATION PERIOD** |

**Mutually develop performance goals for the next evaluation period.** Identify areas for growth. If performance is in need of improvement, work with Human Resources to establish an improvement plan at this time. The plan should include new goals as well as a commitment to improve performance in those areas which are currently weak. **Take the opportunity to discuss any available resources that may be beneficial in achieving these goals and objectives.**

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| **Goals:** {Insert Goals Here} |
| **Resources:** Ex: Professional development/training, budget, FTE, equipment, allocated time, mentoring, coaching, support, travel, approvals, etc. |

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| **POSITION DESCRIPTION REVIEW** |

[ ]  Current position description generally reflects the duties of the position.

[ ]  Current position description is not accurate and needs to be reviewed and updated.

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| **OVERALL PERFORMANCE EVAULATION RATING** |

Using the following standards, please select the summary description that most closely describes the employee’s overall performance for this entire review period:

[ ]  **Exceeds Expectations:** ***Performance often exceeds expectations and requirements of the position***. Incumbent frequently demonstrates the ability to integrate a variety of skills to effectively solve problems and carry out duties, responsibilities and objectives beyond the expectations of the position. Incumbent’s performance is consistent with the behavior associated with the selected critical performance factors. Incumbent adds value to the organization beyond what is expected and is one of the key contributors within the organization.

[ ]  **Achieves Expectations: *Performance meets and sometimes may exceed the position’s requirements and expectations.*** Incumbent adds value to the organization and is a fully competent performer. Critical goals, tasks, and projects are achieved within acceptable standards. During the review period, there may have been some accomplishments that exceeded expectations, some that may have met expectations and, possibly, some areas where results may not have fully met expectations. Overall, the incumbent demonstrates the ability to handle projects or assignments within the scope of the position and demonstrates the ability to integrate a variety of skills to solve problems and carry out duties, responsibilities and objectives. Incumbent’s performance is generally consistent with the behavior associated with the selected critical performance factors. Incumbent adds value to the organization and is a fully competent performer.

[ ]  **Needs Improvement: *Performance often does not meet expectations and requirements of the position. Improvement is necessary.*** Incumbent needs further development and/or improvement in one or more of the critical performance factors. Incumbent requires more than the normal amount of guidance and follow-up to assure that assignments are progressing adequately. Performance is occasionally consistent with the behavior associated with the selected critical performance factors. Sustained progress and improvement are required in one or more of the critical performance factors.

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| **MANAGER’S COMMENTS** |

Comment on the Performance Factors, cite examples where appropriate, and include future performance and professional development objectives.

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| {Insert Narrative Here} |

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| **EMPLOYEE’S COMMENTS** |

May also attach a separate sheet.

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| {Insert Narrative Here} |

*I certify that this evaluation has been discussed with me. My signature does not necessarily indicate that I agree with the evaluation.*

|  |  |  |
| --- | --- | --- |
| Employee Signature |  | Manager Signature |
|  |  |  |
| Employee Name |  | Manager Name |
|  |  |  |
| Date |  | Date |