



Performance Review – Staff Employee

Name: _____ Campus ID Number: _____

Dept: _____ Title: _____ Review Year: **2023**

Instructions:

1. Indicate the level of performance by selecting the appropriate descriptor for each performance factor. Carefully review the following descriptors.

Unsatisfactory – Does not demonstrate the required knowledge, skills, abilities, and/or commitment. Additional comments are required for justification of the use of this rating.
An action plan addressing the area of improvement must be created for each performance factor rated “Unsatisfactory”.

Improvement Needed– Demonstrates acceptable performance in some but not all aspects of the job. Does not consistently meet requirements and the need for improvement is recognized. An action plan addressing the area of improvement must be created for each performance factor rated “Improvement Needed”.

Acceptable – Consistently demonstrates the required knowledge, skills, abilities and commitment for the job and occasionally exceeds expectations.

Exceeds Expectations – Consistently exceeds expectations and demonstrates mastery of most required knowledge, skills, abilities, and commitment.

Exemplary – Demonstrates mastery in all required knowledge, skills, abilities and commitment. This rating is used as special recognition for delivery of extraordinary accomplishments. Additional comments are required for justification of the use of this rating.

2. Comments are required for any ratings of “Unsatisfactory” and “Exemplary” for any performance factor.
3. Provide an Action Plan for ratings of “Improvement Needed” and “Unsatisfactory” in any performance factor. Any performance factors designated as *opportunity for development* should have corresponding explanations and guidance in the Action Plan section.
4. Complete the Supervisory Follow-up section on the Evaluation Summary Sheet. In this section, the supervisor will certify whether the employee has completed all required training and their Conflict of Interest Survey, and whether they would meet eligibility requirements for administrative leave, if available.
5. Designate the employee’s overall rating.
6. Present the evaluation to employee. Both employee and supervisor* should sign the evaluation.

*A supervisory employee is an employee who has authority to hire, transfer, suspend, lay off, recall, promote, discharge, assign, reward, or discipline the employee and may exclude a “lead” employee. Lead employees may attend the evaluation meeting and/or present the evaluation to the employee that they lead.

Indicate the level of performance by selecting the appropriate rating.	Unsatisfactory*	Improvement Needed	Acceptable	Exceeds Expectations	Exemplary*
Performance Factors					
<i>Job Performance</i> – Exhibits the required level of job knowledge and/or skills to perform the job. Assignments completed by the employee meet quality standards. Exhibits the ability to learn and apply new skills, stays appraised of new and current developments, and employs technology to improve efficiencies. Effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action.					
<i>Integrity</i> – Completes tasks as assigned and meets deadlines. Adheres to all applicable university policies and procedures.					
<i>Communication</i> – Effectively uses written and verbal communication skills to proactively and thoroughly communicate job-related information and knowledge.					
<i>Reliability</i> – Plans and organizes work, establishes appropriate priorities, anticipates future needs, and completes assignments effectively. Monitors projects and exercises follow-through, adheres to time frames, arrives on time for meetings and appointments, and responds appropriately to instructions and procedures. Shows a commitment to the job in terms of his/her punctuality and/or absences and use of leave time in accordance with university policies.					
<i>Customer Service</i> – Consistently provides timely and professional service to internal and external customers, treats customers with courtesy, and follows up as needed.					
<i>Cooperation/Teamwork</i> – Displays a cooperative attitude toward work assignments and requirements. Demonstrates consideration of others, maintains rapport with others, and helps others willingly.					
<i>Initiative</i> – Seeks and assumes greater responsibility, searches for new and more creative ways to improve processes, and monitors projects independently.					
<i>Adaptability</i> – Adjusts to a change in duties, procedures, supervisors or work environment. Shifts priorities and focuses on tasks outside their normal responsibilities when needed.					
*Comments/Examples are REQUIRED for any ratings of “Unsatisfactory” or “Exemplary.”					
Action Plan & Goals: (Provide an action plan for all factors where employees have opportunity for development and/or received ratings of “Improvement Needed” or “Unsatisfactory.” Give examples and a timeline for all action items. If applicable, note additional development goals for the upcoming year here.)					

Indicate the level of performance by selecting the appropriate rating.	Unsatisfactory*	Improvement Needed	Acceptable	Exceeds Expectations	Exemplary*
Supervisory Factors – To be completed for employees in a supervisory position* <i>A supervisory employee is an employee who has authority to hire, transfer, suspend, lay off, recall, promote, discharge, assign, reward, or discipline the employee</i>					
<i>Lead/Manage Employees</i> – Uses appropriate/effective style, flexibility, care, and concern to maximize employee productivity.					
<i>Workforce and Resource Planning</i> – Ability to plan, use resources (e.g., time, money, facilities, materials, equipment, and/or employees’ skills), and accomplish objectives. Also consider how well the personal and professional growth of staff for current and future jobs is promoted and supported.					
<i>Communication</i> - Communicates with employee(s) in a clear, concise, accurate, and timely manner and provides constructive feedback. Maintains appropriate level and amount of communication with supervisor.					
<i>Decision Making</i> – Able to identify issues, choose appropriate course of action, and implement effectively.					
<p>*Comments/Examples are REQUIRED for any ratings of “Unsatisfactory” or “Exemplary.”</p>					
<p>Action Plan & Goals: (Provide an action plan for all factors where employee received ratings of “Improvement Needed” or “Unsatisfactory.” Give examples and a timeline for all action items. If applicable, note development goals for the upcoming year here.)</p>					

Evaluation Summary Sheet

	Job Performance	Integrity	Communication	Reliability	Customer Service	Cooperation/Teamwork	Initiative	Adaptability	Lead/Manage Employees	Workforce and Resource Planning	Communication	Decision Making	Total
Unsatisfactory													
Improvement Needed													
Acceptable													
Exceeds Expectations													
Exemplary													

Supervisory Follow-up

Has this employee completed all required training for which they have been enrolled?	Yes	No
Has this employee completed the annual Conflict of Interest Disclosures?	Yes	No
Has this employee met the criteria to be eligible for administrative leave?	Yes	No

OVERALL EVALUATION: (check one)

	Unsatisfactory: Applies to employees who do not demonstrate the required knowledge, skills, abilities, and/or commitment for the job. Employees performing at this level would be expected to improve or move out of the job in a reasonable length of time.
	Improvement Needed: Applies to employees who demonstrate acceptable performance in some but not all aspects of the job. They do not consistently meet requirements, and the need for improvement is recognized.
	Acceptable: Applies to employees who consistently demonstrate the required knowledge, skills, abilities and commitment for the job and occasionally exceeds expectations. Most experienced employees should perform at this level.
	Exceeds Expectations: Applies to employees who consistently exceed expectations and demonstrate mastery of most required knowledge, skills, abilities, and commitment for the job.
	Exemplary: Applies to employees who demonstrate mastery in all required knowledge, skills, abilities and commitment for the job. This rating is used as special recognition for delivery of extraordinary accomplishments. This overall rating is reserved for those few individuals whose exceptional performance is obvious to all.

My signature indicates I have reviewed this performance appraisal and have discussed the contents with my immediate supervisor or his/her designee. My signature also means that I have been advised of my performance and does not necessarily imply I agree with the evaluation. I understand that I may attach my comments to this document to be held in my personnel file in Human Resources.

Employee Signature: _____ Date: _____

Supervisor's Signature: _____ Date: _____

Reviewing Supervisor's Signature: _____ Date: _____