

EMPLOYEE PLANNING AND PERFORMANCE REVIEW FORM

Employee Name		Employee ID	
Classification		Department	
Date of Last Evaluation		Type of Evaluation	

REVIEW TYPE (Please select one. Temporary employees receive annual or additional reviews only.)

1st Probationary

2nd Probationary

3rd Probationary

Additional Reason: _____

Annual (Annual Reviews reflect performance from July 1st – June 30th of each fiscal year.)

REVIEW PERIOD

From: _____ to _____
 (mm/yyyy) (mm/yyyy)

Complete the following sections of the Employee Planning and Performance Review Form.

PLEASE NOTE:

- Before completing this form with the employee being reviewed, please discuss and review it with your Administrative Services Manager (ASM).
- Issues of attendance, reliability, dependability, etc. should be addressed in Section III Item C.
- Any questions or concerns regarding the performance review process should be directed to your ASM or Staff Human Resources.

5 Exemplary: This rating is reserved for the highest level of performance that consistently exceeds standards and expectations during evaluation period. An employee receiving this rating should have a consistent record of achievement.

4 Commendable: This rating applies to an employee who is consistently meeting standards and expectations, often exceeds them, and shows initiative in additional achievement. Often exceeds expectations for supervisory/lead employee.

3 Satisfactory: This rating applies to an employee whose work regularly meets the department’s standards and expectations for performance; periodically performance may exceed these standards. Regularly meets expectations for supervisory/lead employee.

2 Needs Improvement: This rating is appropriate when an employee periodically meets the standards but too often does not do so, which negatively impacts the overall performance level. Needs Improvement, often fails to meet expectations for supervisory/lead employee.

1 Unacceptable: This rating applies to an employee’s performance who is consistently deficient, unacceptable, and seriously impacts job outcomes. Immediate action by the employee to improve performance is required. Immediate action is required.

N/A Not Applicable: This rating is provided for items which the evaluator believes does not pertain to the employee being evaluated.

SKILLS/PERFORMANCE CRITERIA

Numbers 1 - 8 must be completed. Number 8 represents other criteria as appropriate for the specific position. Comments are required for each criterion that has been assigned a rating.

ADDITIONAL COMMENTS

Attach a separate sheet of paper if additional space is needed on any of the sections. Refer to the Section and Question Number when using an additional sheet (e.g Section I, Question 3).

**SECTION I
REQUIRED CRITERIA**

(Use specific behavioral examples to support ratings in every category. Specific examples are mandatory for both exemplary and unacceptable ratings)

1. JOB SKILLS – IMPORTANCE TO POSITION

Critical

Very Important

Important

Consider the ability needed to perform the major responsibilities of this job as noted in the position description. Does the employee consistently demonstrate exceptional skills in performing the major responsibilities of this job as noted in the position description? Does the employee often fail to demonstrate skills to perform the major responsibilities of this job? Are major responsibilities being completed?

Exemplary	Commendable	Satisfactory	Needs Improvement	Unacceptable	N/A
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Please support your rating in the narrative section below

2. AMOUNT OF WORK – IMPORTANCE TO POSITION

Critical

Very Important

Important

Consider the amount of work performed as it relates to achieving the tasks and goals of this position. Are exceptional amounts of work being produced? Is the employee going above and beyond? Is the employee meeting the standards set for this position? Is the employee failing to complete work related to this position?

Exemplary	Commendable	Satisfactory	Needs Improvement	Unacceptable	N/A
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Please support your rating in the narrative section below

3. QUALITY OF WORK – IMPORTANCE TO POSITION

Critical

Very Important

Important

Consider accuracy, organization, effectiveness, and completeness of the employee's work and the degree to which the employee follows through on assignments and completes them on time. Consider how the work compares to quality performance standards and goals for the employee's position. Also consider the amount of supervisory review required to assure work quality. Is the employee going above and beyond expectations? Are deadlines being met?

Exemplary	Commendable	Satisfactory	Needs Improvement	Unacceptable	N/A
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Please support your rating in the narrative section below

4. INITIATIVE & PROBLEM SOLVING – IMPORTANCE TO POSITION

Critical

Very Important

Important

Consider accuracy, organization, effectiveness, and completeness of the employee's work and the degree to which the employee follows through on assignments and completes them on time. Consider how the work compares to quality performance standards and goals for the employee's position. Also consider the amount of supervisory review required to assure work quality. Is the employee going above and beyond expectations? Are deadlines being met?

Exemplary	Commendable	Satisfactory	Needs Improvement	Unacceptable	N/A
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Please support your rating in the narrative section below

5. WORKING RELATIONSHIPS – IMPORTANCE TO POSITION

Critical

Very Important

Important

Consider willingness to establish and maintain cooperative working relationships with all co-workers and other members of the University; if appropriate, include external agencies and the general public. Consider sensitivity to and awareness of differences in people of diverse backgrounds. Does the employee often have problems relating to others, lack/respect and is indifferent to others' needs? Does the employee consistently communicate important information?

Exemplary	Commendable	Satisfactory	Needs Improvement	Unacceptable	N/A
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Please support your rating in the narrative section below

6. COMMUNICATION SKILLS – IMPORTANCE TO POSITION

Critical

Very Important

Important

Consider the ability to provide clear, concise, and effective verbal and written communications, make effective oral presentations and deliver consistent, high quality customer service. Does the employee consistently provide information that is clear, concise and complete? Do skills exceed the requirement of the positions? Is writing often unacceptable and incomplete?

Exemplary	Commendable	Satisfactory	Needs Improvement	Unacceptable	N/A
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Please support your rating in the narrative section below

**SECTION II
ADDITIONAL OR ENHANCING CRITERION**

(Add additional criteria if needed. Please describe each additional performance criterion below)

7. SUPERVISORY/LEAD RESPONSIBILITIES – IMPORTANCE TO POSITION

Critical

Very Important

Important

Consider ability to plan, organize, delegate, and follow up on work-flow to meet unit's goals and objectives. Provides clear expectations and constructive feedback to subordinates on a consistent basis. Consistently treats subordinates fairly. Does employee use sound judgement, act responsibly, and follow-up on commitments? Does employee regularly assess the training and development needs of staff and faculty; identify and inform staff of training development opportunities? Does employee participate in personal and professional development activities, and consider the impact of such training on the college or organizational unit? Does the employee demonstrate initiative and innovation in solving problems?

Exemplary	Commendable	Satisfactory	Needs Improvement	Unacceptable	N/A
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Please support your rating in the narrative section below

**SECTION III
EMPLOYEE DEVELOPMENT**

A. Use the space below to list goals from previous review period and describe how employee has/has not met these goals.

B. Provide examples of positive achievements

**SECTION III
EMPLOYEE DEVELOPMENT (CONTINUED)**

C. Provide specific examples that occurred during this review period which demonstrate this employee's need for improvement.

D. What specific training, professional development, or other learning experiences and goals for the next evaluation period would you recommend for this employee's performance and development plan.

OVERALL RATING

Exemplary	Commendable	Satisfactory	Needs Improvement	Unacceptable	N/A
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EMPLOYEE COMMENTS (to be completed by employee only): Please attach an additional sheet if necessary.

Employee Signature and Date *(Signature does not indicate agreement)*

Department/Unit Evaluator's
Signature and Date

Appropriate Administrator
Signature and Date

Department Use (Optional)
Signature and Date

Draft copy of this evaluation presented to employee on: