**Administrative Professional Employee Annual Performance Evaluation**

The Annual Performance Evaluation is comprised of three components: (1) Job Related Competencies, (2) Performance Values, and (3) Annual Goals. Annual Goals are more appropriate for some jobs than others. Therefore, the use of annual goals in the Annual Performance Evaluation will be determined by the supervisor with input from the employee.

Annual Performance Evaluations shall be completed by the employee’s immediate supervisor in a transparent process with the employee. Annual Performance Evaluations are for the expressed purpose of giving the employee feedback to improve or commend performance moving forward. All supervisors shall be trained on the evaluation process.

**Introduction** –Documented performance evaluations are communication tools to help ensure that supervisors and their direct reports have a shared understanding about expectations and requirements. The evaluation process also provides opportunities for regular interaction and in-person communication.

**Job Related Competencies** – (To be filled out by supervisors based on the job description.) Duties include job related knowledge, skills, and abilities to ensure the right person is in the right job. Defining and measuring competencies allows for the maintenance and development of workforce talent. The competencies included should be related to the core day-to-day operations of this employee’s role. Ideally, the job competencies included in this list should be regularly discussed between the supervisor and employee.

**Performance Values** – Performance values define workplace expectations. Employees are expected to complete tasks adequately, communicate well with a friendly attitude, work well with others, and respond positively to instruction and situational needs.

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| **RATING SCALE DEFINITIONS** | | | | |
| **0 – Not meeting Expectations**  Consistently performs below standard; requires immediate improvement. **Requires a Performance Improvement Plan.** | **1 - Partially Meets Expectations**  Performance does not fully meet expectations. **Goals section should directly establish a clear path to meeting expectations.** | **2 – Meets Expectation**  Performs at expected levels; is fully effective and proficient in job performance.  (This is a good score! Consider a 2 an A) | **3 - Exceeds Expectations**  Consistently performs above expected levels; recognized as an internal resource. | **4 - Far Exceeds Expectations**  Consistently far exceeds expected levels; makes significant progress towards University goals; recognized as an organizational leader. |

**Annual Goals** – Annual goals provide direction for both the employee and the supervisor, and should be consistent with the strategic plan. In some instances, it may be appropriate for a supervisor and employee to define a goal that does not clearly relate to the strategic plan, but does directly relate to a job competency or performance value that needs improvement. These goals also provide a strategic opportunity to make significant change.

Annual goals are not included in the overall scoring of the evaluation, but are still an important tool for supporting individual and university-wide improvement. Instead, the supervisor and employee should consider whether the goal has been accomplished in the last year; whether the goal needs to continue on into the next year; or be revised to account for changing needs in the department.

**Writing Annual Goals** - Goals need to be achievable, specific, time-based, measurable and connected to the strategic plan or job description. In other words, they have to be possible, and they need to describe exactly what you will do, when you will complete it, and how you will “measure” the successful completion of the goal. The supervisor and employee will mutually agree to the demonstration of meeting annual goals and place that agreement in the comments area of the Annual Goals section. At the supervisor’s discretion, goals may be considered to be fluid throughout the year as needs of the department change.

Example Goals:

* Susan: I will complete the Food ServSafe certificate by July 2021.
* Steve: I will plant a beautification garden by the front gate by June 2021.
* Joe: I will develop and implement a maintenance program to follow manufacturing guidelines and specifications by May 2021.
* Jill: I will develop a plan to electronically streamline the load report from start to finish by June 2021.
* Sam: I will respond to non-critical work orders within 24 hours.
* Kate: I will generate one cost savings idea per month.

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| **ANNUAL PERFORMANCE EVALUATION PROGRAM** | | | | | |
| **Dept. Name:** | |  | **Employee Name:** |  | |
| **Supervisor Name:** | |  | **Employee A#:** |  | |
| **Supervisor Title:** | |  | **Employee Title:** |  | |
| **JOB RELATED COMPETENCIES**  **Circle which Job related competencies which require a “Meets” rating (up to 2 total).** | | | | | **Rating**  **(4, 3, 2, 1, 0)** |
| **1** |  | | | |  |
| **2** |  | | | |  |
| **3** |  | | | |  |
| **4** |  | | | |  |
| **5** |  | | | |  |
| **6** |  | | | |  |
| **7** |  | | | |  |
| **8** |  | | | |  |
| Comments: | | | | | |

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| **PERFORMANCE VALUES**  **Circle which performance values are required to have a “Meets” rating (up to 2 total).** | | **Rating**  **(4, 3, 2, 1, 0)** |
| **1** | **Quality of Work:** Accuracy, Thorough, Detailed, Organized, Clean |  |
| **2** | **Work Habits:** Follows Instructions, Utilizes Time and Materials Effectively, Task Completion, Proper Use and Care of University Equipment |  |
| **3** | **Work Schedule & Attendance:** Prompt, Punctual, Absent Only as Approved, Working full scheduled shift |  |
| **4** | **Customer Focused Communication:** Responds to Customers Well, Helpful, Friendly, Communicates Effectively |  |
| **5** | **Teamwork:** Carries Out Tasks/Responsibilities to the End, Cooperates with Other Employees |  |
| **6** | **Policy & Safety Compliance:** Follows University, District, and Safety Policies |  |
| **7** | **Adaptability:** Adjusts Well to Change, Flexible When Necessary |  |
| **8** | **Appropriate Work Place Behavior:** Respectful, Courteous, Uses Appropriate Language, Wears Proper Work Attire |  |
| Comments: | | |

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| **ANNUAL GOALS (The Supervisor and the Employee write the goals during the Annual Performance Evaluation. The Supervisor enters the progress to completion and reviews it with the employee during the following year’s Annual Performance Evaluation.)** | | **Progress to completion (%)** |
| **1** |  |  |
| **2** |  |  |
| **3** |  |  |
| **4** |  |  |
| **5** |  |  |
| Comments: | | |

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| **OVERALL RATING AND SIGNATURE SHEET** | | | | | | | |
| Supervisors can make general comments but are required to comment on ratings that are above or below “Meets”**.** Attach additional sheets and relevant evidence as needed. | | | | | | | |
| Final Summation Narrative: | | | | | | | |
| **OVERALL RATING** | | | | | | | |
| **Far Exceeds**  **(52-64)**  Performance is consistent, of excellent quality, and stands out as truly exceptional. An employee would need to achieve 52-64 points to receive an overall rating of Far Exceeds. | **Exceeds**  **(38-51)**  Performance at a level above expectations. An employee would need to achieve 38-51 points to receive an overall rating of Exceeds. | | **Meets**  **(30-37)**  Performance meets the requirements of the position. An employee would need to achieve 30-37 points and a minimum of meets for the predetermined job related competencies and performance values discussed with the supervisor to receive an overall rating of Meets. | **Partially Meets**  **(16-29)**  Performance does not meet expectations. An employee would need to achieve 16-29 points to receive an overall rating of Partially Meets.  Recommend a Development Plan. | | **Not Met**  **(0-15)**  Performance must improve substantially. An employee would need to achieve 0-15 points to receive an overall rating of Not Met.  Requires a Performance Improvement Plan. | |
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| **Employee Signature:** | |  | | | **Date:** | |  |
| **Supervisor Signature:** | |  | | | **Date:** | |  |