ANGELO STATE UNIVERSITY

PERFORMANCE REVIEW FOR STAFF EMPLOYEES

Employee Name: CID:

Department: Job Title:

Supervisor's Name: Job Title:

Performance Period From: To: Date of Review:

INSTRUCTIONS

1. Use the employee's last performance review, most current position description, critical incident file, and observations as a basis for this review. Section A, B & D of this form applies to all employees and supervisors. Section C applies to supervisors and managers only.

2. Ratings should be based on the following scale and definitions.

   a. **Superior Performance [9 to 10 points] –** Performance is far superior at least 90 to 100% of the time;
   b. **Exceeds Expectations [6 to 8 points]** – Performance exceeds expectations or goals at least 80 to 90% of the time;
   c. **Meets Expectations [3 to 5 points]** – Performance meets supervisor's expectations 70 to 80% of the time;
   d. **Needs Improvement [1 to 2 points]** – Performance does not meet expectations 40 to 70% of the time;
   e. **Does Not Meet Expectations [0 points]** – Performance is not acceptable; significant corrective action is necessary.

3. The original of this completed Performance Review, along with employee comments, must be sent to Human Resources for the employee's personnel file; a copy should be given to the employee and another copy kept in the department files.

SECTION A: TO BE COMPLETED FOR ALL STAFF – EMPLOYEE SELF-REVIEW

❖ **Employee Self-Review:** Ask the employee to describe accomplishments, strengths, and areas of needed improvement during the past performance period. Record comments here.

SECTION B: TO BE COMPLETED FOR ALL STAFF – PERFORMANCE RATINGS

1. **ESSENTIAL JOB FUNCTIONS:** In the text box below, **list at least four essential functions** (duties and responsibilities) of the employee's job. Then rate below, the overall quality of the employee's ability to perform these functions.

☐ **Superior performance [9 to 10 points]** ☐ **Exceeds expectations [6 to 8 points]** ☐ **Meets expectations [3 to 5 points]** ☐ **Needs improvement [1 to 2 points]** ☐ **Does not meet expectations [0 points]**

Rating:

Justification:

2. **ASSIGNMENTS & TASKS:** Rate the employee's ability to perform and complete assignments. Is the work done with an acceptable level of quality? Is it completed on time? Are results satisfactory?

Expectations:

☐ **Superior performance [9 to 10 points]** ☐ **Exceeds expectations [6 to 8 points]** ☐ **Meets expectations [3 to 5 points]** ☐ **Needs improvement [1 to 2 points]** ☐ **Does not meet expectations [0 points]**

Rating:

Justification:

3. **JOB KNOWLEDGE AND SKILL SET:** Does the employee understand the key aspects of the job and possess the knowledge and skills to perform the duties?

Expectations:

☐ **Superior performance [9 to 10 points]**	☐ **Exceeds expectations [6 to 8 points]**	☐ **Meets expectations [3 to 5 points]**	☐ **Needs improvement [1 to 2 points]**	☐ **Does not meet expectations [0 points]**	**Rating:**

Justification:

4. **CUSTOMER SERVICE**: Does the employee demonstrate a helpful, professional and courteous approach to help customers (students, other department personnel, public, etc.)? Does the employee present a professional image in appearance, dress, attitude and demeanor?

Expectations:

☐ **Superior performance [9 to 10 points]**	☐ **Exceeds expectations [6 to 8 points]**	☐ **Meets expectations [3 to 5 points]**	☐ **Needs improvement [1 to 2 points]**	☐ **Does not meet expectations [0 points]**	**Rating:**

Justification:

5. **INTERPERSONAL SKILLS:** Does the employee work well with others? Is the employee cooperative with the supervisor? Is the level of the employee's ability to communicate satisfactory and consistent with the job? Does the employee handle interpersonal conflict and disagreement in a professional manner?

Expectations:

☐ **Superior performance [9 to 10 points]**	☐ **Exceeds expectations [6 to 8 points]**	☐ **Meets expectations [3 to 5 points]**	☐ **Needs improvement [1 to 2 points]**	☐ **Does not meet expectations [0 points]**	**Rating:**

Justification:

6. **ATTITUDE AND WORK ETHIC**: Does the employee demonstrate a positive attitude towards work, assignments and cooperating with others? Does the employee show initiative and willingness to help? Does the employee demonstrate a willingness to complete tasks and to go the "extra mile" to get the job done?

Expectations:

☐ **Superior performance [9 to 10 points]**	☐ **Exceeds expectations [6 to 8 points]**	☐ **Meets expectations [3 to 5 points]**	☐ **Needs improvement [1 to 2 points]**	☐ **Does not meet expectations [0 points]**	**Rating:**

Justification:

7. **ATTENDANCE AND PUNCTUALITY**: Does the employee's attendance record show consistent attendance and punctuality with minimal unscheduled absences?

☐ **Meets expectations [10 points]** ☐ **Needs improvement [5 points]** ☐ **Does not meet expectations [0 points]**

Rating:

Justification:

8. **COMPLIANCE**: Does the employee follow and comply with University and department rules and policies?

☐ **Meets expectations [10 points]** ☐ **Needs improvement [5 points]** ☐ **Does not meet expectations [0 points]**

Rating:

Justification:

SECTION C: TO BE COMPLETED FOR ALL SUPERVISORS – PERFORMANCE RATINGS

9. **SUPERVISORY/MANAGEMENT RESPONSIBILITIES**: Does the supervisor plan, organize, execute, and monitor activities within this job's scope of responsibility? Does the supervisor monitor leave and timekeeping activities of assigned staff? Does the supervisor follow up to ensure assignments are completed?

Expectations:

☐ **Superior performance [9 to 10 points]** ☐ **Exceeds expectations [6 to 8 points]** ☐ **Meets expectations [3 to 5 points]** ☐ **Needs improvement [1 to 2 points]** ☐ **Does not meet expectations [0 points]**

Rating:

Justification:

10. **LEADERSHIP**: Does the supervisor lead by example, motivate employees, build teamwork, and able to accomplish assignments through team members?

Expectations:

☐ **Superior performance [9 to 10 points]**	☐ **Exceeds expectations [6 to 8 points]**	☐ **Meets expectations [3 to 5 points]**	☐ **Needs improvement [1 to 2 points]**	☐ **Does not meet expectations [0 points]**	**Rating:**

Justification:

11. **RESOURCEFULNESS**: Does the supervisor use resources (staff, equipment and materials, funds, time) wisely and effectively to accomplish tasks?

Expectations:

☐ **Superior performance [9 to 10 points]**	☐ **Exceeds expectations [6 to 8 points]**	☐ **Meets expectations [3 to 5 points]**	☐ **Needs improvement [1 to 2 points]**	☐ **Does not meet expectations [0 points]**	**Rating:**

Justification:

12. **PROBLEM SOLVING AND DECISION-MAKING**: Does the supervisor use sound judgment in solving problems and making decisions?

Expectations:

☐ **Superior performance [9 to 10 points]**	☐ **Exceeds expectations [6 to 8 points]**	☐ **Meets expectations [3 to 5 points]**	☐ **Needs improvement [1 to 2 points]**	☐ **Does not meet expectations [0 points]**	**Rating:**

Justification:

13. **EMPLOYEE PERFORMANCE REVIEWS**: Has the supervisor completed performance reviews for all employees under the supervisor's charge?

Expectation: At a minimum, a performance review meeting with the employee must be scheduled and the Performance Review Form must be completed and submitted annually for each employee.

☐ **Meets expectations [10 points]**	☐ **Does not meet expectations [0 points]**	**Rating:**

SECTION D: TO BE COMPLETED FOR ALL STAFF – GOAL SETTING AND DEVELOPMENT

1. **GOALS FOR NEXT PERFORMANCE PERIOD:**

2. **LIST TRAINING AND DEVELOPMENT RESOURCES THAT WILL HELP EMPLOYEE ACCOMPLISH GOALS:**

SECTION E: OVERALL RATING OF EMPLOYEE/SUPERVISOR:

For **Non-Supervisors**, total all of the individual scores (Section B) and write that number here:
[Raw Score will range from 0 to 80]

Divide this Raw Score by **8** to obtain the average score. Write that number here:
This is the employee's overall performance rating [Average will range from 0 to 10]

For **Supervisors**, total all of the individual scores (Section B and C) and write that number here:
[Raw Score will range from 0 to 130]

Divide this Raw Score by **13** to obtain the average score. Write that number here:
This is the supervisor's overall performance rating [Average will range from 0 to 10]

Note: Numerical ratings represent a quantitative measure of an employee's overall performance and can be used to track performance over time and can also be used to comparatively rank your employees within your scope of supervisory responsibility.

SECTION F: EMPLOYEE'S COMMENTS (Optional – Attach additional sheet if necessary)

SIGNATURES

SUPERVISOR

I have met with this employee and discussed his or her Performance Review. I have advised the employee that I will provide him or her with a copy of this signed Review. I have also advised the employee that he or she may add comments or prepare a written statement, if so desired, regarding this performance review.

Supervisor Signature_____ Date _____

EMPLOYEE

I understand that my signature indicates only that I have read and discussed this Performance Review with my supervisor. It does not necessarily mean that I agree with my supervisor's ratings or comments. I may include written comments, if desired. Check **Yes ( )** if comments are included, or check **No ( )** if comments are not included.

Employee Signature_____ Date_____

SIGNATURES: REQUIRED ONLY FOR OVERALL RATINGS OF SUPERIOR PERFORMANCE

Department or Administrative Head _____ Date_____

Vice President _____ Date_____

OHR_03/2009