

STAFF EMPLOYEE PERFORMANCE EVALUATION FORM

(Must be complete by July 31 annually)

_____	_____	
Name	Position/Title	
_____	_____	_____
Supervisor	Review Date	Review Period
_____	_____	
Department	Date of Hire	
List semi-annual review date (recommended):	_____	

PERFORMANCE LEVELS

Instructions: Select from the following performance levels to describe the staff member's overall performance during the review period. Provide explanation and/or specific examples to support the level selected.

EXCEEDS EXPECTATIONS

Performs beyond expectations in a majority of position duties and responsibilities. Consistently meets and, at times, exceeds position expectations – making a significant contribution to the overall achievement of the department's goals. **The use of this rating requires specific examples demonstrating how the staff member exceeded expectations.**

ACHIEVES EXPECTATIONS

Fulfills position requirements, consistently meeting established goals and expectations. Performance makes the expected contributions to the department's goals.

FAILS TO ACHIEVE EXPECTATIONS

Fails to meet one or more of the significant position requirements.
Requires improvements in areas noted.
(Performance improvement plan must be developed and monitored)

SECTION I: ACHIEVEMENT OF GOALS

Instructions: List below, in order of importance, 3 to 5 goals or key job responsibilities that were established for this review period. These items may include new performance goals, special projects, significant job-related accomplishments, job/career development activities, or maintenance of regular duties. Consider to what extent results were achieved and what factors contributed to their success or not meeting their goals and responsibilities, and how might they overcome them. Below, select the performance level that best describes the staff member's achievement of these goals throughout the review period. *(Please use the sheet at the end of this form to provide additional content as needed.)*

GOALS	RESULTS ACHIEVED	CONTRIBUTING FACTORS

PERFORMANCE LEVEL: Section I – Achievement of Goals

E: Employee S: Supervisor

E S

- Exceeds Expectations
- Achieves Expectations
- Fails to Achieve Expectations

EMPLOYEE COMMENTS:	SUPERVISOR COMMENTS:

SECTION II: SKILLS & RESPONSIBILITIES – APPRAISAL & DEVELOPMENT

The following key skills are essential for all staff in achieving success in their positions. Depending upon position requirements, other job-specific skills may be required of a staff member. The extent to which the staff member demonstrates these skills or needs to strengthen them should be reviewed as part of the performance evaluation, staff development, and/or performance improvement discussions.

Instructions: Select and comment on the performance level demonstrated by the staff member during the review period for the following skill areas: *(D Y G i g h Y g Y h U h Y Y b X c Z h g z f a t c d j X U X h b U w h h i g b Y X X)*

SKILLS/RESPONSIBILITIES	Exceeds Expectations	Achieves Expectations	Fails To Achieve Expectations	ACTION PLAN
JOB KNOWLEDGE:	E <input type="checkbox"/> S <input type="checkbox"/>	E <input type="checkbox"/> S <input type="checkbox"/>	E <input type="checkbox"/> S <input type="checkbox"/>	
<ul style="list-style-type: none"> ▪ Demonstrates the knowledge and skills required to perform the job, including administrative policies and procedures, technical and/or specialized knowledge /expertise and managerial/supervisory skills. ▪ Understands position goals, responsibilities, and expectations. ▪ Is current on professional/technical developments related to position 	Comments:			
INCLUSIVENESS:	E <input type="checkbox"/> S <input type="checkbox"/>	E <input type="checkbox"/> S <input type="checkbox"/>	E <input type="checkbox"/> S <input type="checkbox"/>	
<ul style="list-style-type: none"> ▪ Shows respect for differences in backgrounds, lifestyles, viewpoints, and needs, with regard to ethnicity, gender, creed, and sexual orientation ▪ Promotes cooperation and a welcoming environment for all ▪ Works to understand the perspectives brought by all individuals ▪ Pursues knowledge of diversity and inclusiveness 	Comments:			
ADAPTABILITY:	E <input type="checkbox"/> S <input type="checkbox"/>	E <input type="checkbox"/> S <input type="checkbox"/>	E <input type="checkbox"/> S <input type="checkbox"/>	
<ul style="list-style-type: none"> ▪ Is flexible, open and receptive to new ideas and approaches ▪ Adapts to changing priorities, situations and demands ▪ Handles multiple tasks and priorities ▪ Modifies one's preferred way of doing things 	Comments:			
SELF DEVELOPMENT:	E <input type="checkbox"/> S <input type="checkbox"/>	E <input type="checkbox"/> S <input type="checkbox"/>	E <input type="checkbox"/> S <input type="checkbox"/>	
<ul style="list-style-type: none"> ▪ Enhances personal knowledge, skills, and abilities ▪ Anticipates and adapts to technological advances as needed ▪ Seeks opportunities for continuous learning ▪ Seeks and acts upon performance feedback 	Comments:			

COMMUNICATION:	E <input type="checkbox"/> S <input type="checkbox"/>	E <input type="checkbox"/> S <input type="checkbox"/>	E <input type="checkbox"/> S <input type="checkbox"/>	
<ul style="list-style-type: none"> ▪ Demonstrates the ability to express thoughts clearly, both orally and in writing ▪ Demonstrates effective listening skills ▪ Shares knowledge and information ▪ Asks questions and offers input for positive results ▪ Is diplomatic, courteous, and welcoming 	Comments:			
TEAMWORK:	E <input type="checkbox"/> S <input type="checkbox"/>	E <input type="checkbox"/> S <input type="checkbox"/>	E <input type="checkbox"/> S <input type="checkbox"/>	
<ul style="list-style-type: none"> ▪ Builds working relationships to solve problems and achieve common goals ▪ Demonstrates sensitivity to the needs of others ▪ Offers assistance, support, and feedback to others ▪ Works effectively and cooperatively with others ▪ Is approachable/accessible to others ▪ Reaches out to be helpful in a timely and responsive manner ▪ Strives to satisfy one's external and/or internal constituencies 	Comments:			
SERVICE:	E <input type="checkbox"/> S <input type="checkbox"/>	E <input type="checkbox"/> S <input type="checkbox"/>	E <input type="checkbox"/> S <input type="checkbox"/>	
<ul style="list-style-type: none"> ▪ Community Service, volunteer activities, representing Ohio Wesleyan University to the Community ▪ Service to Ohio Wesleyan University, committee participation, volunteerism, event participation 	Comments:			
STEWARDSHIP:	E <input type="checkbox"/> S <input type="checkbox"/>	E <input type="checkbox"/> S <input type="checkbox"/>	E <input type="checkbox"/> S <input type="checkbox"/>	
<ul style="list-style-type: none"> ▪ Demonstrates accountability in all work responsibilities ▪ Exercises sound and ethical judgment when acting on behalf of the university ▪ Exercises appropriate confidentiality in all aspects of work ▪ Shows commitment to work and to consequences of own actions 	Comments:			
MOTIVATION:	E <input type="checkbox"/> S <input type="checkbox"/>	E <input type="checkbox"/> S <input type="checkbox"/>	E <input type="checkbox"/> S <input type="checkbox"/>	
<ul style="list-style-type: none"> ▪ Shows initiative, anticipates needs and takes actions ▪ Demonstrates innovation, creativity and informed risk-taking ▪ Engages in problem-solving; suggests ways to improve performance and be more efficient ▪ Strives to achieve individual, departmental and university goals 	Comments:			
COMMUNITY STANDARDS	E <input type="checkbox"/> S <input type="checkbox"/>	E <input type="checkbox"/> S <input type="checkbox"/>	E <input type="checkbox"/> S <input type="checkbox"/>	
<ul style="list-style-type: none"> ▪ Demonstrates a clear understanding of the Community Standards and their importance to the OWU culture/mission ▪ Utilizes/exhibits behaviors articulated in the Community Standards with all constituents of the University 	Comments:			

PERFORMANCE LEVEL: Section II – Skills for Success

E: Employee S: Supervisor

E S

Exceeds Expectations

Achieves Expectations

Fails to Achieve Expectations

EMPLOYEE COMMENTS:	SUPERVISOR COMMENTS:

SECTION III: OVERALL PERFORMANCE EVALUATION

Instructions: Consider the overall performance levels from Section I and Section II. Select a level to describe the staff member's overall performance throughout the entire performance period:

OVERALL PERFORMANCE LEVEL

E: Employee S: Supervisor

E S

Exceeds Expectations

Achieves Expectations

Fails to Achieve Expectations

EMPLOYEE COMMENTS:	SUPERVISOR COMMENTS:

SECTION IV: FUTURE GOALS & PROFESSIONAL DEVELOPMENT

Instructions: List 3 to 5 performance goals or key job responsibilities for the upcoming performance period. These goals may be related to new responsibilities/projects, improvement of ongoing responsibilities, and professional and personal growth and development. Note staff member’s activities and projected completion dates. As these are forward looking goals, they may be modified by the staff member or supervisor based upon changes in assignment, departmental objectives or other factors. (D\Yg1 g\hYg\YfUih\YbXcZ\|gZfa\c'dfg\|XUX\|kbU\Wbhi\gb\XXX)

GOALS/RESPONSIBILITIES	STAFF ACTION PLANS	PROJECTED DATE
<p>Community Standards – choose two of the seven Community Standards and explain how you will focus on them in a way that will have significant impact on how you do your job, interact with others, or further OWU’s mission, strategic plan and goals.</p>		

SECTION V: STAFF MEMBER’S COMMENTS

Staff member should comment on strengths, weaknesses, accomplishments, disappointments, development or any other dimension of performance. (D\Yg1 g\hYg\YfUih\YbXcZ\|gZfa\c'dfg\|XUX\|kbU\Wbhi\gb\XXX)

COMMENTS:

SECTION VI: SIGNATURES

Staff Member: _____ Date: _____

I have reviewed this document with my supervisor. My signature indicates that I have completed these discussions, but does not necessarily imply my agreement: any areas of disagreement are noted in my comments above (or in the attached document). I understand that I am entitled to receive a copy of this form and attachments, bearing all required signatures.

Immediate Supervisor: _____ Date: _____

Next Level Supervisor: _____ Date: _____

Human Resources: _____ Date: _____

Senior Leadership Team Member: _____ Date: _____

Questions and comments regarding Ohio Wesleyan University's performance evaluation process may be addressed to the Director of Human Resources at x3394.

ADDITIONAL CONTENT

Please use the space below to include any additional content that did not fit in the answer spaces provided on the previous pages. Indicate the corresponding section number, heading, and page number (e.g., Section II – Skills and Responsibilities, Job Knowledge, page 3).