

SUPERVISORY & CONFIDENTIAL EMPLOYEE ANNUAL PERFORMANCE SUMMARY

Employee's Name: _____	University ID#: _____
Employee's Classification: _____	Department: _____
Date employee began present position: _____	Review Period: from _____ to _____
Supervisor's Name: _____	Position/Title: _____
Length of time employee has worked for present supervisor: _____	

RATING CATEGORIES AND DEFINITIONS

EXCEPTIONAL PERFORMANCE	Consistently exceeds expectations. Performance is characterized by exceptionally high work quality. Employees rated as having exceptional performance repeatedly make contributions which are far above the requirements of their position. They use exceptional judgment and regularly exhibit mastery of their job assignments.
HIGHLY SUCCESSFUL PERFORMANCE	Frequently exceeds expectations. Performance indicates thorough attention to and the completing of all assigned responsibilities. Unusual problems are properly considered and generally well handled. Individuals strive for job improvement and initiative is regularly displayed. The contribution of these individuals is usually beyond that expected.
SUCCESSFUL PERFORMANCE	Performance meets the requirements of the position. The position is being covered in an adequate manner and the responsibilities are being handled competently.
NEEDS DEVELOPMENT	Performance does not consistently meet all expectations of the position. Supervisor needs to clearly identify areas for development and collaboratively work with employee to establish an action plan.
UNACCEPTABLE PERFORMANCE	Performance does not meet minimum expectations of the position. Supervisor needs to specifically identify unacceptable performance and expectations to achieve successful performance.

I. Check your rating for each criteria or factor identified below; follow with supportive comments:

<p>Job Knowledge and Skills – The extent to which an employee demonstrates technical and functional knowledge and the skill level required to complete assignments efficiently and effectively. Includes learning and adapting to changing skill requirements and pursuing developmental opportunities relating to job responsibilities.</p> <p>Employee's Performance is: Exceptional <input type="checkbox"/> Highly Successful <input type="checkbox"/> Successful <input type="checkbox"/> Needs Development <input type="checkbox"/> Unacceptable <input type="checkbox"/></p> <p>SUPPORTIVE COMMENTS:</p>
<p>Communication – The extent to which an employee is proficient and professional in oral and written communications and communicates effectively to foster and promote achievement of departmental mission and organizational goals. Includes listening carefully, understanding, remembering, and following oral/written instructions; asking for clarification when necessary; and providing information or instructions to others in a clear, complete and concise manner.</p> <p>Employee's Performance is: Exceptional <input type="checkbox"/> Highly Successful <input type="checkbox"/> Successful <input type="checkbox"/> Needs Development <input type="checkbox"/> Unacceptable <input type="checkbox"/></p> <p>SUPPORTIVE COMMENTS:</p>

Organizational and Time Management Skills – The extent to which an employee works efficiently and productively, and effectively manages resources (labor, time, materials, etc.) Includes planning and organizing work for greatest efficiency and effectiveness. Also includes the extent to which employee reviews and develops procedures and recommendations for revision and implementation in both the assigned and related work areas.

Employee's Performance is: Exceptional Highly Successful Successful Needs Development Unacceptable

SUPPORTIVE COMMENTS:

Decision Making/Problem Solving – The extent to which an employee demonstrates proper judgment, decision making, and problem solving skills. Includes anticipating and analyzing problems effectively, drawing accurate conclusions, applying innovative solutions to problems, and identifying issues and alternative solutions. Also includes the extent to which employee identifies and appropriately resolves issues that might stop or delay job/project completion, foresees the impact and implications of decisions, and promptly informs supervisor of issues beyond the employee's scope of responsibility.

Employee's Performance is: Exceptional Highly Successful Successful Needs Development Unacceptable

SUPPORTIVE COMMENTS:

Reliability – The extent to which an employee can be relied upon regarding task completion and follow-up, including meeting deadlines on time without sacrificing accuracy, work quality, departmental objectives, or customer service satisfaction. Includes following established safety standards, maintaining appropriate attendance and punctuality, and adhering to university/divisional/departmental policies and procedures.

Employee's Performance is: Exceptional Highly Successful Successful Needs Development Unacceptable

SUPPORTIVE COMMENTS:

Teamwork – The extent to which an employee maintains positive working relationships and takes ownership of work. Includes a demonstrated willingness to help others, working cooperatively with others to achieve shared goals, and fostering team participation and openness to others' views and ideas. Also includes the extent to which employee encourages, supports and facilitates cooperation, pride, trust, and group identity.

Employee's Performance is: Exceptional Highly Successful Successful Needs Development Unacceptable

SUPPORTIVE COMMENTS:

Other – *(In reference to employee's job description, describe any additional criteria or factors to be evaluated)*

Employee's Performance is: Exceptional Highly Successful Successful Needs Development Unacceptable

SUPPORTIVE COMMENTS:

II. Does the employee being evaluated have supervisory responsibilities? Yes No

If yes, complete this section. If no, skip to section III.

Leadership Skills – The extent to which an employee provides appropriate and effective direction to staff, encourages innovation, motivates staff to accomplish goals, and builds teamwork. Includes setting example for excellence and communicating the vision and goals of university/division/department.

Employee's Performance is: Exceptional Highly Successful Successful Needs Development Unacceptable

SUPPORTIVE COMMENTS:

Supervisory Skills – The extent to which an employee recognizes the need for and appropriately involves others in the completion of work assignments, demonstrates attention to detail, and systematically organizes own work and work of those supervised. Includes clearly defining, overseeing, and ensuring satisfactory completion of delegated work. Also includes extent to which employee shows fairness and impartiality in interactions with staff, resolves conflicts and disputes among staff, and prepares and conducts meaningful and objective performance evaluations on each individual supervised. Includes extent to which employee appropriately handles corrective discipline and employee grievances; maintains appropriate performance and situational documentation; effectively administers applicable rules, contracts, policies and procedures; and supports the University/divisional/departmental mission and strategic plan.

Employee's Performance is: Exceptional Highly Successful Successful Needs Development Unacceptable

SUPPORTIVE COMMENTS:

Developing Staff – The extent to which an employee is able to select, train, and develop staff to function effectively with a high degree of independence. Includes identifying potential in staff and providing and recommending training and developmental experience to realize that potential. Also includes exhibiting effective coaching and training skills, promoting employee development and career growth, and providing timely informal performance feedback.

Employee's Performance is: Exceptional Highly Successful Successful Needs Development Unacceptable

SUPPORTIVE COMMENTS:

III. Complete this Section for all Employees:

OVERALL PERFORMANCE SUMMARY: Indicate the performance level that most closely reflects how the employee's overall performance measured up to what should normally be expected from an employee with similar experience at this level.

Employee's Performance is: Exceptional Highly Successful Successful Needs Development Unacceptable

ADDITIONAL REMARKS:

1. What does the employee feel would be helpful for his/her job or career development?

2. What recommendations does the supervisor have for employee's job or career development (seminars, training, schooling, etc.)?

CHECKLIST FOR ANNUAL PERFORMANCE SUMMARY MEETING

The following areas were discussed between the Supervisor and Employee during the Annual Performance Summary meeting:

Check When Completed:

- The employee's primary responsibilities during the past year (provide job description to employee) and how they relate to overall unit/department objectives.
- Employee's strengths and areas for growth.
- Employee's significant accomplishments during the review period.
- Possible ways to improve performance.
- Barriers to effective work performance and job satisfaction during the review period.
- Employee's goals and needs for the next review period.
- Employee's long term career goals and development needs.
- Supervisor's goals for the employee for the next review period.
- Employee's feedback/suggestions.
- Anything else the employee or supervisor would like to address.

Employee's Comments (optional): [If you prefer, attach additional page(s) or Discussion Guide]

Employee's signature* _____ Date: ___/___/___
*I acknowledge that this Annual Performance Summary was discussed with me.

Supervisor's signature: _____ Date: ___/___/___

Original to: Human Resource Services, 106 Gilchrist; Mail Code 0034
Copies to: Employee
Supervisor
Dean/Department Head

Other Related Forms Available:
Discussion Guide for Annual Performance Summary
Supervisor Guidelines for Conducting Performance Appraisals
Action Plan (sample form)