



Butler University

Performance Evaluation Summary (Sample)

Staff Name:	Performance Period:
Position:	Department:

The primary purpose of a performance evaluation is to stimulate communication and help the supervisor and staff member discuss the level of performance associated with the job duties and responsibilities. The following pages list various categories the supervisor will use to evaluate the staff member's performance during the previous year to include providing an explanation for each category. The numbers indicate the extent to which this person uses these skills or demonstrates these characteristics. Please follow the instructions below to complete the form.

Step 1:

Identify critical job competencies which relate to the individual's quality/quantity of work, communication, customer service, work habits and supervisor abilities. You may use some or all of the competencies listed on the form. If the listed competency is not appropriate, replace it with the appropriate job competency.

Step 2:

Circle the rating which best demonstrates the staff member's performance of the competency. The explanation and recommendation section must be completed for any ratings of 1, 2 or 5.

Step 3:

(For Leaders and Professional Staff only) Under the **Leadership/Professional Goals** section, rate and discuss the goals agreed upon at the beginning of the evaluation year. (See the "Performance Management Guide" for tips on how to write goals.) The explanation and recommendations section should be used to explain ratings, work priorities and requirements needed in the future to enhance the rating(s).

- 1 = Unsatisfactory: Fails to meet minimum expectations for the position.
- 2 = Needs Development: Meets minimum job expectations but needs further training and/or improvement.
- 3 = Meets Expectations: Consistently displays competent, effective performance.
- 4 = Above Expectations: Consistently exceeds expectations for most major accountabilities and meets others.
- 5 = Outstanding: Consistently makes significant contributions above and beyond position expectations.

1. Quality/Quantity of Work:

- Consistently completes work in a timely manner that is accurate, thorough, and neat. 1 2 3 **4** 5
- **Completes all projects on time and within budget.** 1 2 3 **4** 5
- Possesses skills necessary to perform expectations of position. 1 2 3 **4** 5
- **Mastered PeopleSoft training tracking system.** 1 2 3 **4** 5

Explanation and Recommendation:

10% of total score was based on Quality/Quantity of Work rating.

2. Communication:

- Communicates well with faculty, staff, students, and outside constituencies, listening carefully and responding appropriately. 1 2 3 4 **5**
- Works well with other members of department. Willingly shares ideas and is able to compromise when necessary. 1 2 3 4 **5**
- **Produces written documents that are clear and concise.** 1 2 3 4 **5**

Explanation and Recommendation:

10% of total score was based on Communication rating.

3. Customer Service:

- Displays a positive attitude in dealings with customers, staff, faculty, and students. 1 2 3 **4** 5
- **Handles all employee relations issues in a timely manner.** 1 2 3 **4** 5
- Demonstrates flexibility with customers (clients) and other staff by considering alternative solutions to problems presented. 1 2 **3** 4 5

Explanation and Recommendation:

10% of total score was based on Customer Service rating.

4. Work Habits:

- Effectively plans and organizes work assigned so it is completed without excessive instruction or close supervision. 1 2 3 **4** 5
- **Benchmarks and implements best practices.** 1 2 3 **4** 5
- Formulates alternative solutions to problems. 1 2 3 **4** 5
- **Takes initiative to learn new skills.** 1 2 3 **4** 5
- Is willing to ask questions when not fully understanding the job to be done. 1 2 3 **4** 5
- Willingly adapts to new or changed situations. 1 2 3 **4** 5
- Is committed to completing the task at hand by deadlines set. Makes effort to overcome obstacles. 1 2 3 **4** 5
- **Is resourceful and seeks new ways to accomplish task.** 1 2 **3** 4 5
- Accepts additional responsibility when asked. 1 2 3 **4** 5
- Consistently exercises good judgment in analyzing work

Sample

situations and draws sound conclusions. 1 2 3 **4** 5

Explanation and Recommendation:

10% of the total score was based on work habit ratings.

5. Supervisory Abilities (if applicable):

- Communicates effectively and listens to concerns and ideas of others. States views concisely and logically when speaking or writing. 1 2 3 **4** 5
- Uses financial resources wisely and efficiently. 1 2 **3** 4 5
- Develops, implements, and completes short and long-term plans for the department. 1 2 3 **4** 5
- Creates environment of fairness and trust among co-workers; maintaining good, cooperative working relationships. 1 2 **3** 4 5
- **Retains, motivates and coaches staff to achieve top performance.** 1 2 3 **4** 5
- Exercises good judgment in analyzing work situations and deals with these situations in an effective manner. 1 2 3 **4** 5

Explanation and Recommendation:

20% of Score was based on supervisory abilities ratings.

6. Leadership/Professional Goals:

(Goals should have been discussed at beginning of evaluation year.)

Identify the two most impactful skill gaps that currently impede work performance and determine at least one means (formal or informal) to close each gap.

1. _____ 1 2 3 **4** 5
Attend one professional conference in the HR field and prepare a report for your colleagues at Butler.
2. _____ 1 2 3 **4** 5
Identify alternatives to hiring new staff to cover increased workload.
3. _____ 1 2 3 4 **5**
Prepare and submit an annual staff development plan, linked to Butler's strategic plan.
4. _____ 1 2 3 4 **5**
Ensure that faculty and staff hiring practices conform to EEOC requirements.
5. _____ 1 2 3 4 **5**

Explanation and Recommendation:

Goal ratings counted for 40% of total score. (This was discussed with staff at the beginning of evaluation period.)

Overall evaluation summary: The following rating definitions have been established to provide an equitable evaluation process to improve communication, define performance expectations, improve job productivity, and summarize job performance.

Overall Performance Rating Scale

- Outstanding:** Performs at a level of exceptional accomplishment. Consistently makes significant contributions, going above and beyond position expectations.
- Above Expectations:** Consistently performs at a level that meets and often exceeds expectations of the position.
- Meets Expectations:** Adequate performance. Consistently displays competent and effective performance that meets the basic expectations of the position.
- Needs Development:** Meets minimum job expectations, but needs improvement in key areas of accountability.
- Unsatisfactory:** Fails to meet minimum expectations; needs immediate and effective attention.

OVERALL EVALUATION RATING: Above Expectations

Supervisor's Comments: _____

7. Goals for Upcoming Year: Determine goals to be attained within upcoming evaluation year.

Sample

8. Staff Member's Comments: (Optional)

Supervisor's signature _____ Date _____

Staff Member's signature _____ Date _____
(My signature does not necessarily imply agreement but verifies that I have read and discussed this review with my supervisor.)