



Performance Management Program

“Plan – Coach – Appraise”

The purpose of the B W Performance Management Program is to provide an opportunity for self-assessment of job performance, managerial review, and goal setting for the future.

Name: _____

ANNUAL PERFORMANCE EVALUATION FORM

INSTRUCTIONS

1. Manager receives Annual Performance Evaluation Forms and updated job descriptions for all employees in his/her area from Human Resources. (Note: If Job Description has been changed, Manager should send an updated electronic copy to H.R.)
2. Manager completes Section I Demographics and the Goals and Objectives in Section II.
3. If desired, Manager inserts any Department-Specific Success Factors in Section V.
4. Manager gives Annual Performance Evaluation Form and job description to employee.
5. Employee completes comments in Section II, self-assessment in Section III, self-evaluations in Sections IV, V, & VI* and returns completed form to Manager.
6. Employee reviews his/her job description to see if any changes are recommended and returns to Manager.
7. Manager reviews employee self-assessment and job description and establishes a time to meet with employee to conduct Annual Performance Evaluation.
8. Manager completes comments in Section II and evaluations in Sections IV, V, & VI*, assigns an Overall Rating in Section VII, and adds comments. (IMPORTANT: Anytime an Overall Rating of OP-Outstanding Performance or U-Unsatisfactory is given, it must be discussed with appropriate VP before discussing with the employee).
9. Manager and employee meet to review and discuss the completed Annual Performance Evaluation and to establish goals in Section VIII for the upcoming year.
10. Employee signs the review and adds comments, if applicable.
11. Manager signs the review and adds comments, if applicable.
12. Manager sends Annual Performance Evaluation to their immediate supervisor who reviews, signs, and returns.
13. Manager provides copy to employee, retains a copy, and sends the original to Human Resources.

**Required for those who supervise or manage other staff members*

I. EMPLOYEE DEMOGRAPHIC INFORMATION

Review Period (check one): ACADEMIC YEAR (June 1/May 31) _____ FISCAL YEAR (July 1/June 30) _____

Employee Name: _____ Position Title: _____

Performance Evaluation Date: _____ Department: _____

Manager Name: _____ Manager Title: _____

II. GOALS AND OBJECTIVES

Manager lists goals for the evaluation period. Employee completes self-assessment by adding comments that describe performance toward those goals. Manager may add comments describing performance after reviewing self-assessment.

GOAL/OBJECTIVE:

EMPLOYEE COMMENTS:

MANAGER COMMENTS:

GOAL/OBJECTIVE:

EMPLOYEE COMMENTS:

MANAGER COMMENTS:

GOAL/OBJECTIVE:

EMPLOYEE COMMENTS:

MANAGER COMMENTS:

GOAL/OBJECTIVE:

EMPLOYEE COMMENTS:

MANAGER COMMENTS:

III. SELF-ASSESSMENT

Employee answers self-assessment questions as input to the performance evaluation. This should be completed by the employee and submitted to their Manager prior to meeting for the review. Employee should also review his/her job description and be ready to discuss any recommended changes with their Manager.

1. Briefly describe your accomplishments (in addition to progress toward your previous year's goals) over the past performance period.
2. Identify an area(s) where you would like to improve your performance.
3. Is there anything your Manager or the College could do to help you improve your performance and/or increase your job satisfaction? (i.e., additional training, resources, clearer communication, sharing information/job knowledge, etc.)
4. List any other subjects you would like to discuss with your Manager during your performance review.

IV. PERFORMANCE SUCCESS FACTORS

Using the following ratings legend (see full descriptions on page 10):

OP – Outstanding Performance | EP – Excellent Performance | SP – Successful Performance | NI – Needs Improvement | U – Unsatisfactory

Employee should self-assess his/her own performance in each general category below. Manager then rates employee following the employee's self-evaluation. Supporting comments, added by the manager, are encouraged. Any categories ratings of OP-Outstanding Performance or U-Unsatisfactory require supporting comments.

EFFICIENCY AND TIME MANAGEMENT – Includes punctuality and productivity issues such as:

Attends work as scheduled, arriving and leaving at appropriate times. Manages time effectively and maximizes productivity. Completes assignments without prompting, meeting established deadlines.

EMPLOYEE

MANAGER

OVERALL RATING:

MANAGER COMMENTS:

COMMUNICATION AND TEAMWORK - Performance specifically related to communication and teamwork such as:

Promotes the mission and goals of the department, division, and College. Effectively communicates with manager, co-workers, and others. Clearly and concisely conveys information both verbally and in writing. Promotes teamwork. Works well as a team member and individual contributor.

EMPLOYEE

MANAGER

OVERALL RATING:

MANAGER COMMENTS:

EFFECTIVENESS - Includes the quantity and quality of work as well as organizational skills necessary to perform successfully. Examples include:

Accepts responsibility and accountability. Performance reflects attention to detail and accuracy to produce quality results. Demonstrates resourcefulness, problem-solving and decision-making skills. Uses technology appropriate to job position.

EMPLOYEE

MANAGER

OVERALL RATING:

MANAGER COMMENTS:

CUSTOMER SERVICE ORIENTATION - Includes attitude, behavior, interpersonal, and problem solving skills that enable an employee to respond to internal and external constituent needs and expectations in a positive manner. Examples include:

Exhibits a positive attitude toward customer service. Responds promptly and appropriately to internal and external constituent requests. Interacts with people in a supportive, respectful manner. Acknowledges and respects individual and cultural differences.

	EMPLOYEE	MANAGER
OVERALL RATING:	_____	_____

MANAGER COMMENTS:

ADAPTABILITY - Includes flexibility needed to fulfill job responsibilities including adapting to changes in the work environment and accepting appropriate feedback such as:

Responds to change in a positive manner. Offers to assist others without being prompted. Demonstrates willingness to accept new assignments. Accepts constructive criticism and modifies behavior appropriately. Expands job knowledge and skills through training and development.

	EMPLOYEE	MANAGER
OVERALL RATING:	_____	_____

MANAGER COMMENTS:

EMPLOYEE COMMENTS (for entire section):

VI. LEADERSHIP, MANAGERIAL, AND SUPERVISION PERFORMANCE SUCCESS FACTORS*

Required for those who supervise or manage other staff members

Using the same ratings legend (see full descriptions on page 10):

OP – Outstanding Performance | EP – Excellent Performance | SP – Successful Performance | NI – Needs Improvement | U – Unsatisfactory

Employee should self-assess his/her own performance in each category below. Manager then rates employee following the employee's self-evaluation. Supporting comments, added by the manager, are encouraged. Any categories ratings of OP-Outstanding Performance or U-Unsatisfactory require supporting comments.

LEADERSHIP

Engages in strategic thinking that supports the College's mission. Appropriately supports the diversity mission of the College. Models highest standards of professionalism, collegiality, personal integrity, and ethical behavior. Demonstrates drive and initiative. Adapts well to shifting demands and changing priorities. Demonstrates leadership by taking action despite risk or discomfort.

	EMPLOYEE	MANAGER
OVERALL RATING:	_____	_____

MANAGERIAL

Responsively manages overall accountability for assigned work group. Uses good judgment and makes sound decisions on a timely basis. Manages conflict constructively and copes well with frustration and stress. Analyzes routine and complex issues effectively. Positively influences others by articulating a compelling message, negotiating persuasively, and garnering support. Implements employee Performance Management Program effectively.

	EMPLOYEE	MANAGER
OVERALL RATING:	_____	_____

BUDGETARY & PLANNING

Plans, implements, and manages change effectively. Allocates resources according to priorities. Works within budgetary constraints. Develops and leverages innovative ideas into cost savings, revenue opportunities, and/or improved services. Learns continuously and keeps abreast of latest developments in his/her field.

	EMPLOYEE	MANAGER
OVERALL RATING:	_____	_____

SUPERVISION

Challenges, inspires, and appreciates staff members. Establishes trust with staff and fosters open communication channels. Coaches staff members to improve work performance. Recognizes and addresses staff development needs. Establishes positive working relationships within the campus community. Promotes collaboration and teamwork. Delegates assignments appropriately to staff members.

	EMPLOYEE	MANAGER
OVERALL RATING:	_____	_____

MANAGER COMMENTS:

VII. OVERALL RATING – PERFORMANCE SUMMARY

Manager selects an Overall Rating of employee’s job performance (check appropriate category below) and adds supporting comments. Employee may add comments after review discussion.

OUTSTANDING PERFORMANCE	Performance is clearly outstanding and consistently exceeds the requirements and the expectations of the job. Based on job responsibilities, the employee makes extraordinary contributions to the College’s mission.
EXCELLENT PERFORMANCE	Employee demonstrates performance beyond expectations for the position. Performance is well above the competent level.
SUCCESSFUL PERFORMANCE	Employee performance meets the criteria and standards of job performance. Performance is steady, reliable, and is maintained with appropriate supervision.
NEEDS IMPROVEMENT	Meets some, but not all, expectations. Performance is marked with inconsistency demonstrated through periods of poor job performance. Performance requires improvement or further development.
UNSATISFACTORY	Performance is unacceptable and does not meet standards. Major improvement is needed.

MANAGER COMMENTS:

EMPLOYEE COMMENTS:

This appraisal was reviewed by: Employee Signature: _____ Date: _____
With my signature I acknowledge that this performance appraisal was shared with me.

This appraisal was prepared by: Manager Signature: _____ Date: _____

NEXT LEVEL MANAGEMENT: This appraisal was reviewed by:

Name: _____ Signature: _____ Date: _____

COMMENTS:

VIII. PERFORMANCE GOALS AND OBJECTIVES FOR UPCOMING YEAR

Goals are established at the time of the annual review (or at a subsequent meeting) for the upcoming year. Comments may be added at the mid-year review meeting. Goals should be specific, measurable, attainable, realistic, and timely.

GOAL: _____

HOW WILL GOAL BE ACCOMPLISHED? _____

COMPLETION TARGET DATE: _____

GOAL: _____

HOW WILL GOAL BE ACCOMPLISHED? _____

COMPLETION TARGET DATE: _____

GOAL: _____

HOW WILL GOAL BE ACCOMPLISHED? _____

COMPLETION TARGET DATE: _____

GOAL: _____

HOW WILL GOAL BE ACCOMPLISHED? _____

COMPLETION TARGET DATE: _____



Detailed instructions for B-W's Performance Management Program can be found at <http://www.bw.edu/resources/hr/perform>.