

Roger Williams University

PERFORMANCE PLANNING and EVALUATION

Name: Click or tap here to enter text

Employee ID: Click or tap here to enter text

Department: Click or tap here to enter text

Title: Click or tap here to enter text

Evaluator: Click or tap here to enter text

Date: Click drop-down to enter a date

Performance Period:

From Click drop-down to enter a date

To Click drop-down to enter a date

PURPOSE

This evaluation form is intended to guide a discussion about an employee's accomplishments over the last year, to develop plans for the upcoming year, and to document the discussion, including the agreed upon action steps to be taken.

The form must be completed by both the employee and supervisor and reviewed by Human Resources. Events that have occurred over the past 12 months should be considered during this evaluation (include positive observations and accomplishments, negative performance patterns and neutral factors).

INSTRUCTIONS

- 1) Select the most appropriate rating for your employee for each of the general performance areas.
- 2) List specific accomplishments, critical incidents, areas in need of improved performance, strengths, weaknesses and developmental opportunities in the comments sections. When considering attendance and dependability, please remember that approved leaves of absences should not be part of the evaluation.
- 3) Create performance/developmental goals appropriate for the employee's position. **Managers should include professional development action items for their employees.**
- 4) Review the employee's self-evaluation and adjust the form if appropriate.
- 5) Obtain supervisor's signature prior to meeting with your employee.
- 6) Set a specific time to meet and review the evaluation with your employee. Following the meeting, forward the signed review to Human Resources.
- 7) Review progress towards goals on a continuous basis and discuss with the employee on a regular periodic basis (e.g., monthly, quarterly); adjust goals and/or provide timely and ongoing performance feedback.

Performance Rating Descriptions

O = Outstanding Performance. Results achieved exceeded all performance expectations regarding this goal, project or behavior. Reserved for individuals who regularly, consistently and substantially exceed overall expectations. These individuals work with little or no supervision and produce work that is exceptionally high in quality with an outstanding additional contribution that deserves special recognition.

S = Strong Performance. Results achieved met all expectations regarding this goal, project or behavior and occasionally exceeded expectations. Demonstrates high level of effectiveness and judgement.

M = Meets Expectations. Results demonstrate effective performance. Performance is reflective of a fully qualified and experienced individual in this position. Viewed as someone who gets the job done and effectively prioritizes work. Contributes to the overall objectives of the department – a solid performance.

N = Not Meeting Expectations. Regularly has difficulty meeting expected quality, quantity, customer service goals, behaviors and/or timeliness standards.

A. Behavioral Summary

Using the ratings on Page 2, click on the appropriate rating for each of the behavioral characteristics below.

Integrity - Gains the trust and confidence of others by interacting in a fair and honest manner. O S M N

Excellence - Produces high-quality work consistently, over time. O S M N

Respect - Demonstrates flexibility and open mindedness to others while exhibiting courtesy, caring, tact and positive regard. O S M N

Initiative - Demonstrates drive, resourcefulness, independent thinking, and accepts responsibility for actions. O S M N

Team Work - Works effectively and supportively with others to achieve a common goal. O S M N

Innovation - Develops and applies new and innovative ideas and practices. Takes risks and looks for “other right answers” rather than sticking to the way it has always been done. O S M N

Communicates With Others - Effectively expresses ideas and point of view to others as needed. Keeps others informed of actions that may impact them. O S M N

Customer Focus – Listens, identifies, prioritizes, and exceeds the needs of internal and external customers. O S M N

Timeliness - Schedules, organizes, plans and completes work assignments within expected timeframes. O S M N

Attendance - Attends work and work-related functions as needed, arriving promptly. O S M N

Self-Development - Keeps up to date with industry trends and developments focusing on acquiring skills to prepare for the future. O S M N

Mentoring – Teaches and cross-trains department employees and interested employees from other areas. O S M N

Adaptability – Works effectively in changing situations and with diverse individuals and groups. Demonstrates flexibility in responding to changes and new opportunities. O S M N

Diversity and Intercultural Understanding – Fosters and promotes inclusion and equity within the work group. Develops capability to accurately understand and adapt behavior to cultural differences and commonalities. O S M N

B. Performance Summary

This section is for remarks concerning overall performance or factors regardless of the overall rating. Please include examples of specific performance.

1. Accomplishments during the last 12 months:

Enter text and tab

2. Strengths this employee possesses:

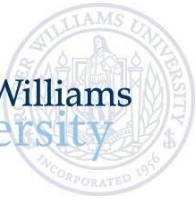
Enter text and tab

3. Opportunities for this employee to capitalize on strengths:

Enter text and tab

4. Areas needing improvement that affect the employee's job performance:

Enter text and tab



C. Goal Setting *(since last review, if applicable)*

1. Goal:
Enter text and tab

Result:
Enter text and tab

2. Goal:
Enter text and tab

Result:
Enter text and tab

3. Goal:
Enter text and tab

Result:
Enter text and tab

4. Goal:
Enter text and tab

Result:
Enter text and tab

5. Goal:
Enter text and tab

Result:
Enter text and tab

D. Performance/Developmental Goals

Establish goals and standards of performance for the next evaluation period. The goals and standards should be focused on tangible results, such as services or deliverables to internal and/or external customers. Identify performance expectations as necessary.

GOALS FOR NEXT EVALUATION:

1. Enter text and tab
2. Enter text and tab
3. Enter text and tab
4. Enter text and tab
5. Enter text and tab

Use the Ratings on Page 2 to complete this section:

Overall Rating - Provide an overall rating based on the rating of the general behavioral characteristics, adherence to significant performance standards, and accomplishment of essential job duties and goals. This rating provides an overall assessment of job performance that is supported by Sections A, B and C.

O S M N

NOTE: Evaluations with an overall rating of "N" should be reviewed with Human Resources.

E. EMPLOYEE COMMENTS

1. This evaluation has been discussed with me, and I have been offered the opportunity to comment on it.

Please check one of the following:

I concur with the evaluation. I do not concur with the evaluation.

Employee Comments:

If you wish to comment about your evaluation, you may do so in the following section with an attachment:

Enter text and tab

2. How do you feel your performance may be improved?

Enter text and tab



F. SIGNATURES

Note: Provide the 2nd and 3rd signatures below (as well as printed name) prior to meeting with the employee and/or obtaining the employee's signature. After employee signature is obtained, return completed form to the Department of Human Resources. The Department of Human Resources will share information, as necessary, with appropriate representatives of the University and/or the employee.

Employee: _____ **Date:** Click drop-down

Print Name: Enter text and tab _____

Evaluation Supervisor: _____ **Date:** Click drop-down

Print Name: Enter text and tab _____

Department/Office Head: _____ **Date:** Click drop-down

Print Name: Enter text and tab _____

Human Resources: _____ **Date:** Click drop-down

Print Name: Enter text and tab _____