

# JOB PERFORMANCE EVALUATION FORM EXEMPT POSITIONS

Name: \_\_\_\_\_  
\_\_\_\_\_

Evaluation Period: \_\_\_\_\_

Title: \_\_\_\_\_ Date: \_\_\_\_\_

## PERFORMANCE PLANNING AND RESULTS

### Performance Review

- Use a current job description (job descriptions are available on the HR web page).
- Rate the person's level of performance, using the definitions below.
- Review with employee each performance factor used to evaluate his/her work performance.
- Give an overall rating in the space provided, using the definitions below as a guide.

### Performance Rating Definitions

The following ratings must be used to ensure commonality of language and consistency on overall ratings: (There should be supporting comments to justify ratings of “Outstanding” “Below Expectations, and “Unsatisfactory”)

|                      |  |
|----------------------|--|
| Outstanding          | Performance is consistently superior                           |
| Exceeds Expectations | Performance is routinely above job requirements                |
| Meets Expectations   | Performance is regularly competent and dependable              |
| Below Expectations   | Performance fails to meet job requirements on a frequent basis |
| Unsatisfactory       | Performance is consistently unacceptable                       |

### A. PERFORMANCE FACTORS (use job description as basis of this evaluation).

|   |  |                    |  |                             |  |                           |  |                           |  |
|---|--|--------------------|--|-----------------------------|--|---------------------------|--|---------------------------|--|
| <b>Administration</b> - Measures effectiveness in planning, organizing and efficiently handling activities and eliminating unnecessary activities | <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 2px;"><b>Outstanding</b></td> <td style="width: 20px; height: 20px;"></td> </tr> <tr> <td style="padding: 2px;"><b>Exceeds Expectations</b></td> <td style="width: 20px; height: 20px;"></td> </tr> <tr> <td style="padding: 2px;"><b>Meets Expectations</b></td> <td style="width: 20px; height: 20px;"></td> </tr> <tr> <td style="padding: 2px;"><b>Below Expectations</b></td> <td style="width: 20px; height: 20px;"></td> </tr> </table> | <b>Outstanding</b> |  | <b>Exceeds Expectations</b> |  | <b>Meets Expectations</b> |  | <b>Below Expectations</b> |  |
| <b>Outstanding</b>  |  |                    |  |                             |  |                           |  |                           |  |
| <b>Exceeds Expectations</b>   |  |                    |  |                             |  |                           |  |                           |  |
| <b>Meets Expectations</b>   |  |                    |  |                             |  |                           |  |                           |  |
| <b>Below Expectations</b>   |  |                    |  |                             |  |                           |  |                           |  |

|   |   |  |
|---|---|--|
|   | <p style="text-align: center;"><b>Unsatisfactory</b><br/><b>NA</b></p>  |  |
| <p><b>Knowledge of Work</b> - Consider employee's skill level, knowledge and understanding of all phases of the job and those requiring improved skills and/or experience.</p>  | <p style="text-align: center;"><b>Outstanding</b><br/><b>Exceeds Expectations</b><br/><b>Meets Expectations</b><br/><b>Below Expectations</b><br/><b>Unsatisfactory</b><br/><b>NA</b></p> |  |
| <p><b>Communication</b> - Measures effectiveness in listening to others, expressing ideas, both orally and in writing and providing relevant and timely information to management, co-workers, subordinates and customers.</p>  | <p style="text-align: center;"><b>Outstanding</b><br/><b>Exceeds Expectations</b><br/><b>Meets Expectations</b><br/><b>Below Expectations</b><br/><b>Unsatisfactory</b><br/><b>NA</b></p> |  |
| <p><b>Teamwork</b> - Measures how well this individual gets along with fellow employees, respects the rights of other employees and shows a cooperative spirit.</p>   | <p style="text-align: center;"><b>Outstanding</b><br/><b>Exceeds Expectations</b><br/><b>Meets Expectations</b><br/><b>Below Expectations</b><br/><b>Unsatisfactory</b><br/><b>NA</b></p> |  |
| <p><b>Decision Making/Problem Solving</b> - Measures effectiveness in understanding problems and making timely, practical decisions.</p>  | <p style="text-align: center;"><b>Outstanding</b><br/><b>Exceeds Expectations</b><br/><b>Meets Expectations</b><br/><b>Below Expectations</b><br/><b>Unsatisfactory</b><br/><b>NA</b></p> |  |
| <p><b>Expense Management</b> - Measures effectiveness in establishing appropriate reporting and control procedures; operating efficiently at lowest cost; staying within established budgets.</p>   | <p style="text-align: center;"><b>Outstanding</b><br/><b>Exceeds Expectations</b><br/><b>Meets Expectations</b><br/><b>Below Expectations</b><br/><b>Unsatisfactory</b><br/><b>NA</b></p> |  |
| <p><b>Human Resource Management</b> - Measures effectiveness in selecting qualified people; evaluating subordinates' performance; strengths and development needs; providing constructive feedback, and taking appropriate and timely action with marginal or unsatisfactory performers. Also considers efforts to further the university goal of equal employment opportunity.</p> | <p style="text-align: center;"><b>Outstanding</b><br/><b>Exceeds Expectations</b><br/><b>Meets Expectations</b><br/><b>Below Expectations</b><br/><b>Unsatisfactory</b><br/><b>NA</b></p> |  |
| <p><b>Independent Action</b> - Measures effectiveness in time management; initiative and independent action within prescribed limits.</p>   | <p style="text-align: center;"><b>Outstanding</b><br/><b>Exceeds Expectations</b><br/><b>Meets Expectations</b><br/><b>Below Expectations</b><br/><b>Unsatisfactory</b><br/><b>NA</b></p> |  |
| <p><b>Job Knowledge</b> - Measures effectiveness in keeping knowledgeable of methods, techniques and skills required</p>  | <p style="text-align: center;"><b>Outstanding</b><br/><b>Exceeds Expectations</b><br/><b>Meets Expectations</b><br/><b>Below Expectations</b></p>   |  |

|  |   |  |
|--|---|--|
| in own job and related functions; remaining current on new developments affecting SPSU and its work activities.  | Unsatisfactory<br>NA  |  |
| <b>Leadership</b> - Measures effectiveness in accomplishing work assignments through subordinates; establishing challenging goals; delegating and coordinating effectively; promoting innovation and team effort.                                      | Outstanding<br>Exceeds Expectations<br>Meets Expectations<br>Below Expectations<br>Unsatisfactory<br>NA |  |
| <b>Managing Change and Improvement</b> - Measures effectiveness in initiating changes, adapting to necessary changes from old methods when they are no longer practical, identifying new methods and generating improvement in facility's performance. | Outstanding<br>Exceeds Expectations<br>Meets Expectations<br>Below Expectations<br>Unsatisfactory<br>NA |  |
| <b>Customer Responsiveness</b> - Measures responsiveness and courtesy in dealing with internal staff, external customers and vendors; employee projects a courteous manner.  | Outstanding<br>Exceeds Expectations<br>Meets Expectations<br>Below Expectations<br>Unsatisfactory<br>NA |  |
| <b>Personal Appearance</b> - Measures neatness and personal hygiene appropriate to position.   | Outstanding<br>Exceeds Expectations<br>Meets Expectations<br>Below Expectations<br>Unsatisfactory<br>NA |  |
| <b>Dependability</b> - Measures how well employee complies with instructions and performs under unusual circumstances; consider record of attendance and punctuality.  | Outstanding<br>Exceeds Expectations<br>Meets Expectations<br>Below Expectations<br>Unsatisfactory<br>NA |  |
| <b>Safety</b> - Measures individual's work habits and attitudes as they apply to working safely. Consider their contribution to accident prevention, safety awareness, ability to care for SPSU property and keep workspace safe and tidy.             | Outstanding<br>Exceeds Expectations<br>Meets Expectations<br>Below Expectations<br>Unsatisfactory<br>NA |  |
| <b>Employee's Responsiveness</b> - Measures responsiveness in completing job tasks in a timely manner.   | Outstanding<br>Exceeds Expectations<br>Meets Expectations<br>Below Expectations<br>Unsatisfactory<br>NA |  |

**B. EMPLOYEE STRENGTHS AND ACCOMPLISHMENTS:** Include those which are relevant during this evaluation period. This should be related to performance or behavioral aspects you appreciated in their performance.

**C. PERFORMANCE AREAS WHICH NEED IMPROVEMENT:**

**D. PLAN OF ACTION TOWARD IMPROVED PERFORMANCE:**

**E. EMPLOYEE COMMENTS:**

**F. JOB DESCRIPTION REVIEW SECTION:** (Please check the appropriate box.)

- Employee job description has been reviewed during this evaluation and no changes have been made to the job description at this time.
- Employee job description has been reviewed during this evaluation and modifications have been proposed to the job description. The modified job description is attached to this evaluation.

**G. SIGNATURES:**

Employee \_\_\_\_\_ Date \_\_\_\_\_

\_\_\_\_\_  
(Signature does not necessarily denote agreement with official review and means only that the employee was given the opportunity to discuss the official review with the supervisor.)

Evaluated by \_\_\_\_\_ Date \_\_\_\_\_

Reviewed by \_\_\_\_\_ Date \_\_\_\_\_