

TYPE OF REPORT: SELF EVALUATION

EMPLOYEE INFORMATION

Name

Title

Rating Period:

From

—

To

Department/Project Name

PURPOSE

The purpose of the “Employee Performance Evaluation” is to increase communication between employees and supervisory personnel concerning the performance of employees in accomplishment of their assigned duties and responsibilities, the establishment of specific work-related goals and objectives and the preparation of a personal development plan for further employee development.

INSTRUCTIONS

Review the employee's work performance for the entire period; refrain from basing judgement on recent events or isolated incidents only. Disregard your general impression of the employee and concentrate on one factor at a time.

Evaluate the employee on the basis of standards you expect to be met for the position to which assigned considering the length of time in the job. Rate only those factors that are applicable to the position. Circle the number that most accurately reflects the level of performance for the factor appraised using the rating scale described below:

- | | |
|----------------------------------|---|
| Unsatisfactory (1) | The employee's work performance is inadequate and definitely inferior to the standards of performance required for the job. Performance at this level can not be allowed to continue. |
| Improvement (2) Needed | The employee's work performance does not consistently meet the standards of the job. Serious effort is needed to improve performance. |
| Meets Job (3) Standards | The employee's work performance consistently meets the standards of the job. |
| Exceeds Job (4) Standards | The employee's work performance is frequently above the satisfactory level, however, it has not achieved an overall level of outstanding performance. |
| Outstanding (5) | The employee's work performance is consistently excellent when compared to the standards of the job. |

I. PERFORMANCE EVALUATION AND ACHIEVEMENTS

Review the factor definitions on the last page before rating the employee; then, check the rating 1, 2, 3, 4, 5 which reflects the appropriate level of performance. Factors listed, which do not pertain to an employee's actual job duties, should not be rated and a N/A (Not Applicable) should be indicated.

Use the space provided for comments to substantiate factor ratings of (1) Unsatisfactory, (2) Improvement Needed, (3) Meets Job Standards, (4) Exceeds Job Standards, or (5) Outstanding. Describe the employee's strengths and/or areas for improvement.

1. JOB SKILLS AND ABILITY	1	2	3	4	5	N/A
A. Job understanding	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. Job knowledge and skills	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C. Analytical ability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
D. Judgement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
E. Initiative/Motivation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
F. Supervision required	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments:

2. QUANTITY	1	2	3	4	5	N/A
A. Amount of work performed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. Completion of work on time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments:

3. QUALITY	1	2	3	4	5	N/A
A. Accuracy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. Thoroughness	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C. Neatness of work product	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
D. Communication	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments:

4. WORK HABITS

	1	2	3	4	5	N/A
A. Observance of working hours	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. Attendance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C. Observance of rules and procedures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
D. Adherence to instructions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
E. Plans and organizes work	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
F. Adaptability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
G. Professionalism	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments:

5. CUSTOMER SERVICE

	1	2	3	4	5	N/A
A. Acceptance of supervision	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. Teamwork	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C. Working with Customers/Vendors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments:

6. SUPERVISORY/MANAGEMENT ABILITY

*For those individuals responsible for "indirect supervision" (authority over the work of employees via assigning, reviewing, and coordinating the work - in other words, the "supervisor" is responsible for the work but not the worker) ratings should only be given for categories A, B, and F.

	1	2	3	4	5	N/A
A. Accepting responsibility*	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. Directing work*	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C. Training	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
D. Evaluating performance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
E. Disciplinary control	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
F. Leadership and motivational ability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments:

II. ACHIEVEMENTS RELATIVE TO SUPERVISOR'S OBJECTIVES

Comments:

III. SUMMARY RATING

Considering the results obtained against established performance standards as well as overall job performance, the following rating is provided:

- Unsatisfactory
 Improvement needed
 Meets Job standards
 Exceeds Job standards
 Outstanding

Comments:

IV. FUTURE OBJECTIVES AND/OR DEVELOPMENT PLAN

Comments:

V. EMPLOYEE COMMENTS

Employee Comments:

Employee Date

Supervisor Date

A copy of this evaluation is provided to the employee and the original is forwarded to the Foundation Human Resources Department for placement in the employee's official personnel file.

FACTOR DEFINITIONS

1. JOB SKILLS & ABILITY

- A. Job Understanding** - The degree to which the employee perceives clearly and fully the nature and function of his/her job in the organizational setting.
- B. Job Knowledge and Skills** - The extent to which the employee possesses the knowledge and skill to perform the job.
- C. Analytical Ability** - The ability to analyze facts, arrive at alternative solutions and provide acceptable recommendations.
- D. Judgement** - The ability to correctly interpret a situation and make sound evaluations as demonstrated by practical decisions and their results.
- E. Initiative/Motivation** - The extent to which the employee applies him/herself to their responsibilities by initiating action on their own to accomplish a task without direction.
- F. Supervision Required** - The amount of supervision needed to assure the employee will perform his/her assigned duties in an acceptable manner.

2. QUANTITY

- A. Amount of Work Performed** - The volume of work produced in relation to the amount of work requiring completion or attention.
- B. Completion of Work on Schedule** - The extent to which an employee completes work within given or reasonable time limits.

3. QUALITY

- A. Accuracy** - The extent to which work is free from errors.
- B. Thoroughness** - The extent to which work is completed, with all details covered, avoiding the necessity to perform further work to complete it.
- C. Neatness of Work Product** - The extent to which a finished work product meets acceptable standards for legibility, cleanliness and orderliness.
- D. Communication Skills** - The extent to which an employee is capable of expressing his/her thoughts in both orally and in writing in a logical manner and sequence, using appropriate grammar, punctuation and sentence structure.

4. WORK HABITS

- A. Observance of Working Hours** - The extent to which an employee is prompt and/or present during designated work periods.
- B. Attendance** - The extent to which an employee absences him/herself from the job.
- C. Observance of Rules and Procedures** - The extent to which an employee follows established Corporation and departmental rules and procedures.
- D. Adherence to Instructions** - The ability to perform according to written or verbal instructions.
- E. Plans and Organizes Work** - The ability to develop an approach to work which will effectively utilize time, material and manpower in an equitable manner to achieve the greatest results with a minimum of time and effort.
- F. Adaptability** - The extent to which the employee adapts with a minimum of difficulty to new orders, policy changes, new personnel, different assignments, etc. and performs properly.
- G. Professionalism** - The effectiveness of the employee in displaying the required disposition for the position, including but not limited to maintaining: a positive attitude, respect for others, proper appearance, confidentiality, and honesty.

5. CUSTOMER SERVICE

- A. Acceptance of Supervision** - The manner in which the employee carries out orders or suggestions relating to specific tasks or responsibilities.
- B. Teamwork** - The extent to which the employee willingly cooperates with other employees when the job requires it.
- C. Working with Customers/Vendors** - The effectiveness of the employee in relating to the public for the mutual satisfaction of both in carrying out specific responsibilities.

6. SUPERVISORY/MANAGEMENT ABILITY

- A. Accepting Responsibility** - The extent to which the employee voluntarily performs assigned duties, accepts new duties and assumes responsibility for the actions of subordinates.
- B. Directing Work** - The extent to which the employee gives appropriate direction to subordinates to effectively accomplish the work of the group.
- C. Training** - The extent to which the employee recognizes deficiencies in subordinates and provides personal training through proper instruction.
- D. Evaluating Performance** - The extent to which the employee accurately and timely evaluates the performance of subordinates, documents observations, and works with subordinates to correct their deficiencies.
- E. Disciplinary Control** - The extent to which the employee maintains a consistent and impartial standard of acceptable conduct, performance and quality of work while exercising proper and effective discipline when required.
- F. Leadership and Motivational Ability** - The ability to inspire the confidence, loyalty and willing cooperation and compliance of subordinates in accomplishing the group's responsibilities.