



STAFF PERFORMANCE EVALUATION FORM

Support Staff (SS) and Professional Staff (PS) Job Description Titles

Mission – To conduct education, research and clinical services in the context of community engagement to train health professionals who promote wellness, provide care with excellence and compassion, and transform the health of underserved communities.

Name: _____ **Department:** _____

Position Title: _____ **ID #:** _____

Supervisor: _____ **Supervisor's Title:** _____

Evaluation Date: _____ **Evaluation Period:** _____

Evaluation Type: **Annual** ☐ **Bi-Annual** ☐ **Other** ☐

SCORING: Mark the number that best describes the employee's performance. If the item does not apply to the employee, mark "N/A". Do not factor a score for that item into the section subtotal or final score. Calculate the evaluation score by adding the sub-totals of all sections and dividing that total by the score of items which were applicable to the employee.

EVALUATION DESCRIPTION		RATINGS	SCORE (RANGE)
Outstanding	Performance in achieving goals far surpasses all expectations. Consistently contributes to the organization's objectives in an outstanding way. Seeks out and achieves aggressive, difficult, and complex objectives. Viewed as a leader, problem solver, or key resource for the organization.	5	4.51-5.00
Exceeds Expectations	Performance in achieving goals is beyond expectations. Overall performance consistently exceeds expectations. Employee can manage more difficult goals and objectives that are the norm for the position. Viewed as a notable contributor to the organization.	4	3.51-4.50
Meets Expectations	Performance in achieving goal fully meets all expectations. Overall performance consistently meets position requirements and standards. Viewed as a solid, reliable, and meaningful contributor to the organization	3	2.51-3.50
Needs Improvement	Performance in achieving goals does not meet expectations. Overall performance and contributions are lower than those required by the job. Additional training, development, or focus may be considerations with Employee in new positions. Viewed as someone with potential but not fully realizing their contribution to the organization.	2	1.51-2.50
Below Expectations	Performance in achieving goals is far below expectations. Overall performance is consistently below expectations for this role. Immediate corrective action must be taken by the Employee to improve performance. Viewed as a risk to the organization in current role.	1	1.00-1.50

I. WORK PERFORMANCE	5	4	3	2	1	N/A
1. <u>Quality of work</u> - Employee's performance of job tasks is accurate or error-free and generally meets the highest standards. Employee utilizes practical application of job knowledge as demonstrated by creativity and initiative. <i>CDU Value – Excellence, Integrity, Service</i>						
2. <u>Written and oral communication</u> - Employee is effective in expressing ideas, facts, and data through speech, written communication, or graphics used in the field. Employee is able to provide accurate and timely documentation, as needed, for his or her job tasks. <i>CDU Value – Excellence, Accountability, Integrity</i>						
3. <u>Judgment</u> – employee has the ability to analyze available data concerning an issue and research a sound solution coming to a viable decision. <i>CDU Value - Accountability</i>						
4. <u>Innovation and creativity</u> - Employee is able to independently determine alternate ways of getting tasks accomplished. Employee shows innovation or creativity in accomplishing assignments. Introduces new and or improved processes or approaches that make a meaningful difference for the organization. Identifies and helps eliminate barriers to customer or team member satisfaction. <i>CDU Value – Innovation</i>						
5. <u>Goal accomplishment</u> - Employee completes most tasks put into process and can be depended upon to fully accomplish assignments. Employee made a significant contribution to advancing departmental and or division goals. <i>CDU Value – Service, Leadership</i>						
6. <u>Attendance</u> - Employee consistently adheres to set work. <i>CDU Value - Accountability</i>						
7. <u>Dependability</u> - Employee can be depended on to conscientiously carry out job tasks and to do so in a manner that is constructive. <i>CDU Value – Accountability, Service, Integrity, Excellence</i>						
Enter Columns 1-5 Rating Sub-total:						
Enter Section I Sub-total:						

II. INTERPERSONAL SKILLS	5	4	3	2	1	N/A
1. <u>Assertiveness and initiative</u> - Employee is a self-starter, when appropriate, and has little difficulty expressing ideas and suggestions that are relevant to the job tasks. Employee anticipates problems and identifies tasks through own initiatives. <i>CDU Value: Service, Innovation</i>						
2. <u>Ability to take direction</u> - Employee listens well and comprehends directions given. Employee asks appropriate questions to clarify and take action to carry directions out. <i>CDU Value: Accountability</i>						
3. <u>Willingness to learn</u> - Employee is cooperative in learning situations and seeks to improve his or her job skills and ability to perform effectively. <i>CDU Value: Service, Excellence</i>						
4. <u>Tact in relationships</u> - Employee is considerate of the feelings and thoughts of others when expressing him or herself. Employee exhibits a quality of courteousness, cheerfulness, respect, and fairness, in his or her day-to-day interface with students, colleagues, faculty, and other University employees. <i>CDU Value: Diversity, Community, Compassion</i>						
5. <u>Problem solving</u> – Employee participates constructively in problem solving. Employee has the ability to assess situations and apply appropriate information to address work issues. <i>CDU Value: Community, Diversity</i>						

6. Customer focus – Employee provides leading customer service by delivering timely, accurate, and effective solutions to internal and external customers. Employee demonstrates genuine, outstanding service that exceeds internal and or external customer expectations; anticipates and proactively resolves internal/external customer issues; and exceeds expectations in building and sustaining relationships with team members, patients, faculty, students, vendors, the community-at-large, and customers. <i>CDU Value: Excellence, Integrity, Service, Accountability</i>						
7. Integrity and ethics – Employee presents the unvarnished truth in an appropriate and helpful manner. Demonstrates high professional standards of conduct through uncompromising principles and values. Leads by example-holds him or herself accountable for actions and outcomes. Keeps promises and honors commitments. States the truth even if it hurts his or her own argument or raises concerns. <i>CDU Value: Integrity, Leadership, Community</i>						
Enter Columns 1-5 Rating Sub-total:						
Enter Section II Sub-total:						

EVALUATION COMMENTS

Comments are mandatory in cases of Outstanding, Needs Improvement and Below Expectations ratings.
(Use additional sheets if necessary)

OUTSTANDING:	
NEEDS IMPROVEMENT:	
BELOW EXPECTATIONS:	
Employee Comments:	

EVALUATION RESULTS WORKSHEET

INSTRUCTIONS: Record the section subtotals for each section in column A. Record the number of applicable items in each section used to evaluate the employee in column B. Divide the total of column A by the total of column B. This will equal the overall evaluation score for the employee.

Section #	Column A Section Sub-totals		Column B # of Applicable Items <i>(Do not include items marked N/A)</i>						
I.	42		10						
II.	39		9						
	81	÷	19	=					
	TOTAL Evaluation Rating		TOTAL Applicable Items						
					<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center;">4.26</td> <td style="width: 50%; text-align: center;">Exceeds Expectations</td> </tr> <tr> <td style="text-align: center;">Overall Evaluation</td> <td style="text-align: center;">Evaluation Description</td> </tr> </table>	4.26	Exceeds Expectations	Overall Evaluation	Evaluation Description
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Supervisor Signature: _____ **Date:** _____

MANDATORY COMPLIANCE & TRAINING (as applicable):

Meets Expectations ☐ **Licensure/registration** – Employee has provided a copy of the current appropriate state and or federal license/certification.

Meets Expectations ☐ **Mandatory Sexual Harassment Training** – Employee has attended mandatory 2 year supervisory sexual harassment training.

Meets Expectations ☐ **Conflict of Interest** – Employee has completed annual conflict of interest disclosure questionnaire.

Meets Expectations ☐ **HIPPA** - Employee has provided a copy of the current appropriate state and or federal license/certification.

Meets Expectations ☐ **Health Clearance** - TB test has been completed and HIV and Aids. Any other health requirement related to position/grant has been met.

Meets Expectations ☐ **HR Training** – CDU Essentials Training and Webinars (Risk Management and Payroll).

Meets Expectations ☐ **Safety Training** – OSHA, Workers Compensation, Emergency Evaluation, Vivarium.

Meets Expectations ☐ **Office of Sponsored Programs (OSP) Training**

Meets Expectations ☐ **Research**

Comments:

B. Did this individual achieve the goals established since the previous performance period? Yes ☐ No ☐ N/A ☐
If no, please explain.

C. PERFORMANCE IMPROVEMENT:

Describe job-related performance improvements (including accountability and responsibility), which would help this individual to be more effective.

D. ACHIEVEMENTS/PAST GOALS/OBJECTIVES:

Please identify this individual's major achievements, involvement actively supporting programs (i.e. health fairs, health initiatives that encourage well-being, etc.), and or committees participated on during this performance evaluation period.

E. NEW GOALS/OBJECTIVES and PROFESSIONAL DEVELOPMENT PLAN:

List below the performance goals that have been developed for this individual to fulfill during the **next fiscal** evaluation period, with a completion timetable for each. Include any courses, reading materials, seminars, and on the job training you think the employee should take to further their knowledge and improve their performance in the University.

Key Result Areas / Performance Objectives:

Define up to five key result areas and corresponding measurable performance objectives with your employee.

- Step 1: Supervisor defines key result areas & performance objectives based on the job description and position responsibilities at the beginning of the evaluation period.
- Step 2: Supervisor and employee discuss and finalize the key result areas & performance objectives.
- Step 3: Supervisor documents the key result areas & performance objectives and provides a copy to the employee.
- Step 4: Supervisor reviews key result areas & performance objectives periodically.

Key result areas/performance objectives:

	Established mm/dd/yy	Reviewed mm/dd/yy	Reviewed mm/dd/yy
GOAL #	1		
Performance Objectives			
A:			
B:			
Comments:			
GOAL #	2		
Performance Objectives			
A:			
B:			
Comments:			

Employee Comments:

I acknowledge I have received and reviewed this Leadership Performance Evaluation and that it has been reviewed with me by my direct supervisor. My signature indicates neither agreement nor disagreement with the content of the evaluation.

Employee Signature: _____ Date: _____

☐

I disagree with portions of this performance review and have a right to file a rebuttal in my personnel file.

Prepare a written rebuttal to your supervisor and send a copy to Human Resources. The rebuttal will be attached with your review in your personnel file.

Please send the completed original performance evaluation form to the Department of Human Resources.