

Administrative/Professional Employee Performance Evaluation Southern Illinois University

To be used for Director-level positions and above

Employee Name:	Employee ID:	Position ID:
Job Title:	Organization:	Fiscal Officer:
Rating Period:	Date:	Evaluator Name:
Reason for Evaluation: <input type="checkbox"/> Annual Evaluation <input type="checkbox"/> Mid Cycle		

INSTRUCTIONS

1. The supervisor should notify the employee when it is time to do his/her evaluation and ask them to submit their self-evaluation in a timely manner.
2. In the meantime, the supervisor should complete an evaluation on the employee's performance.
3. The supervisor takes the two evaluations and discusses them with his/her immediate supervisor to discuss and make any appropriate changes.
4. The supervisor and employee meet to discuss the evaluation, review the position description, and discuss expectations and focus factors for the next rating period.
5. Employees must be rated on all 8 core factors and, in addition, 2 agreed upon focus factors.
6. The supervisor should provide specific comments and examples for all ratings.
7. Prior to signing the form, the employee may make written comments. If more space is needed, please provide additional pages.
8. The original form must be submitted to Labor and Employee Relations by the return due date with all necessary *signatures*. (*Annual performance evaluation due date is **April 1.***)
9. The employing department is required to provide each employee with a copy of his/her evaluation.

Rating Scale and Definition of Ratings

Scale	Definition
O	Outstanding: Performance is exceptional and recognized as superior accomplishments outside of the normal scope of the defined job standards and skills. Contributions have significant and positive impact on the unit or organization.
HE	Highly Effective: Performance consistently exhibits desired competencies effectively and independently while frequently exceeding expectations, standards, requirements, and objectives.
E	Effective: Performance clearly demonstrates a consistent, quality effort. Employee reliably exhibits proficiency of the defined job standards and skills. These employees meet all expectations, standards, requirements, and objectives and, on occasion, may exceed them.
M	Marginal: Performance does not consistently meet established expectations. Performance requires monitoring to achieve consistent completion of work and requires more constant, close supervision.
U	Unsatisfactory: Performance results do not meet acceptable standards for the position. Improvement is required.

Employee Performance Evaluation

Helpful Hints & Checklist

This form will be used by supervisors and managers to appraise A/P staff at the rank of Director or higher and must be completed annually. The performance evaluation requires the rating of an employee in terms of his/her actual performance since the last review.

Rating job performance is an extremely important task. Great care should be taken to avoid a number of different rating errors that affect an evaluator's ability to make accurate ratings. These errors include:

LENIENCY ERROR: Leniency errors occur when a rater rates all employees higher than they should be rated. This type of error may occur when a supervisor is trying to give a staff member the benefit of the doubt. Leniency errors can be detected by examining a number of different rating forms from the same supervisor. When leniency errors are present, most employees are rated in the higher ranges of the scale. For example, leniency rating error is probably present when an evaluator rates 4 out of 5 staff members as outstanding.

CENTRAL TENDENCY: Central tendency errors occur when an evaluator rates all his/her employees effective. This type of error results when a supervisor fails to distinguish the difference in job performance among a number of employees. Central tendency errors can be detected by examining a number of evaluation forms from the same supervisor. When central tendency errors are present, all staff members will be rated effective.

HALO: The third type of error is also very frequent. Halo errors occur when a supervisor fails to distinguish between different aspects of the same person's performance. This type of error occurs when a supervisor has a feeling about a person's overall job performance and rates all aspects of his/her performance at that level. When this type of error is present, a person will be rated marginal or highly effective on all of the performance factors. There will be no mixing of ratings at different levels for the same person.

Remember, you are rating the performance, not the person.

Checklist for performance evaluation:	Yes	No	N/A
Did you discuss each goal or objective established for this employee?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are you and the employee clear on the areas of agreement? Disagreement?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Did you give the employee your thoughts of his or her potential or ability?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Did you and the employee cover all positive skills, traits, and accomplishments?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are you both clear on areas where improvement is required?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Did you indicate consequences for noncompliance, if appropriate?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Were training or development recommendations agreed on?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Did you set clear objectives and focus factors for the next appraisal period?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Was the employee encouraged to voice their own views/comments?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Did you thank the employee for his or her efforts?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Employee Name _____ Employee ID _____

CORE JOB PERFORMANCE FACTORS: *Required for all employees*

Job Knowledge

UNSATISFACTORY	U <input type="checkbox"/>	Comments (Required):
MARGINAL	M <input type="checkbox"/>	
EFFECTIVE	E <input type="checkbox"/>	
HIGHLY EFFECTIVE	HE <input type="checkbox"/>	
OUTSTANDING	O <input type="checkbox"/>	

Quality of Work

UNSATISFACTORY	U <input type="checkbox"/>	Comments (Required):
MARGINAL	M <input type="checkbox"/>	
EFFECTIVE	E <input type="checkbox"/>	
HIGHLY EFFECTIVE	HE <input type="checkbox"/>	
OUTSTANDING	O <input type="checkbox"/>	

Productivity

UNSATISFACTORY	U <input type="checkbox"/>	Comments (Required):
MARGINAL	M <input type="checkbox"/>	
EFFECTIVE	E <input type="checkbox"/>	
HIGHLY EFFECTIVE	HE <input type="checkbox"/>	
OUTSTANDING	O <input type="checkbox"/>	

Communication and Teamwork

UNSATISFACTORY	U <input type="checkbox"/>	Comments (Required):
MARGINAL	M <input type="checkbox"/>	
EFFECTIVE	E <input type="checkbox"/>	
HIGHLY EFFECTIVE	HE <input type="checkbox"/>	
OUTSTANDING	O <input type="checkbox"/>	

Employee Name _____

Employee ID _____

Professionalism

UNSATISFACTORY	U <input type="checkbox"/>	Comments (Required):
MARGINAL	M <input type="checkbox"/>	
EFFECTIVE	E <input type="checkbox"/>	
HIGHLY EFFECTIVE	HE <input type="checkbox"/>	
OUTSTANDING	O <input type="checkbox"/>	

Problem Solving, Decision Making & Judgment

UNSATISFACTORY	U <input type="checkbox"/>	Comments (Required):
MARGINAL	M <input type="checkbox"/>	
EFFECTIVE	E <input type="checkbox"/>	
HIGHLY EFFECTIVE	HE <input type="checkbox"/>	
OUTSTANDING	O <input type="checkbox"/>	

Adaptability

UNSATISFACTORY	U <input type="checkbox"/>	Comments (Required):
MARGINAL	M <input type="checkbox"/>	
EFFECTIVE	E <input type="checkbox"/>	
HIGHLY EFFECTIVE	HE <input type="checkbox"/>	
OUTSTANDING	O <input type="checkbox"/>	

Customer Service *(includes students, faculty, staff, and external constituencies)*

UNSATISFACTORY	U <input type="checkbox"/>	Comments (Required):
MARGINAL	M <input type="checkbox"/>	
EFFECTIVE	E <input type="checkbox"/>	
HIGHLY EFFECTIVE	HE <input type="checkbox"/>	
OUTSTANDING	O <input type="checkbox"/>	

Employee Name _____

Employee ID _____

FOCUS JOB PERFORMANCE FACTORS -2 of the 5 are required for all employees.
Do not complete more than 2.

Adherence to Guidelines

UNSATISFACTORY	U <input type="checkbox"/>	Comments: <i>(Required if selected)</i>
MARGINAL	M <input type="checkbox"/>	
EFFECTIVE	E <input type="checkbox"/>	
HIGHLY EFFECTIVE	HE <input type="checkbox"/>	
OUTSTANDING	O <input type="checkbox"/>	

Leadership and Supervision

UNSATISFACTORY	U <input type="checkbox"/>	Comments: <i>(Required if selected)</i>
MARGINAL	M <input type="checkbox"/>	
EFFECTIVE	E <input type="checkbox"/>	
HIGHLY EFFECTIVE	HE <input type="checkbox"/>	
OUTSTANDING	O <input type="checkbox"/>	

Organization and Planning

UNSATISFACTORY	U <input type="checkbox"/>	Comments: <i>(Required if selected)</i>
MARGINAL	M <input type="checkbox"/>	
EFFECTIVE	E <input type="checkbox"/>	
HIGHLY EFFECTIVE	HE <input type="checkbox"/>	
OUTSTANDING	O <input type="checkbox"/>	

Employee Name _____

Employee ID _____

Knowledge, Use, and Care of Equipment

UNSATISFACTORY	U <input type="checkbox"/>	Comments: <i>(Required if selected)</i>
MARGINAL	M <input type="checkbox"/>	
EFFECTIVE	E <input type="checkbox"/>	
HIGHLY EFFECTIVE	HE <input type="checkbox"/>	
OUTSTANDING	O <input type="checkbox"/>	

Safety and Security

UNSATISFACTORY	U <input type="checkbox"/>	Comments: <i>(Required if selected)</i>
MARGINAL	M <input type="checkbox"/>	
EFFECTIVE	E <input type="checkbox"/>	
HIGHLY EFFECTIVE	HE <input type="checkbox"/>	
OUTSTANDING	O <input type="checkbox"/>	

Administrative/Professional Employee Performance Evaluation Summary Sheet

Southern Illinois University

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Job Classification:	Organization:	Fiscal Officer:
Rating Period:	Date:	Evaluator Name:
Reason for Evaluation:	<input type="checkbox"/> Annual Evaluation	<input type="checkbox"/> Mid Cycle

CORE JOB PERFORMANCE FACTORS: Required for all employees

Job Knowledge Rating _____

Quality of Work Rating _____

Productivity Rating _____

Communication and Team Rating _____

Professionalism Rating _____

Problem Solving, Decision Making, & Judgment Rating _____

Adaptability Rating _____

Employee Name _____

Employee ID _____

Customer Service

Rating _____

FOCUS JOB PERFORMANCE FACTORS: 2 required

Rating _____

Rating _____

FOR OFFICIAL USE ONLY

Complete only if responsible for completing performance evaluations.

Did the supervisor complete or appropriately arrange for completion of all subordinate performance evaluations in a timely manner?

Yes

No*

*If no, the employee is not eligible for merit consideration.

List the two Focus Job Performance Factors that will be used for next rating period.

(If the employee's position changes to the degree with which would warrant a change in the focus factors listed on this form, new factors should be provided to the employee prior to the completion of the next evaluation.)

Employee Comments:

Our signatures certify that this employee and this supervisor met in person to discuss this evaluation.

Employee Signature

Date

The signature of the employee acknowledges review of document, it does not mean agreement with its content.

1st Level Supervisor

Date

2nd Level Supervisor

Date