

California State Polytechnic University, Pomona
PERFORMANCE EVALUATION REPORT
Support Staff Personnel

*Refer to pages 3 and 4
for instructions.*

EMPLOYEE NAME:

SECTION B - Record job strengths, progress toward previous goals and specific goals for future accomplishments. Documentation of all check marks in columns d and e is required. Use attachments, as needed. Evaluator and employee must sign all attachments.

SECTION C - Document examples of problems with performance. Explanation of all check marks in columns a and b is required. Use attachments, as needed. Evaluator and employee must sign all attachments.

Employee's
Signature: _____

Date: / /

Evaluator's
Signature: _____

Date: / /

Dean/Department Head/Director's Signature: _____

Date: / /

Support Staff Instructions for Completing the Performance Evaluation Report

Important Information – The frequency or review cycle for the employee Performance Evaluation Report is noted in the employee's Appointment/Offer Letter, and in the respective Collective Bargaining Agreements. For your convenience the appropriate evaluation procedures by bargaining unit and forms, are available on the Human Resources Department website. For personal assistance, please contact the Human Resources Department.

Completing the Evaluation Report – The form is available electronically and allows you to edit and finalize ratings/comments. Use additional pages if more space is needed for narrative comments. The evaluation is to be discussed in a private interview with the employee. Any changes made to the evaluation during the discussion should be initialed by the employee. **All attachments must be signed by the evaluator and the employee.**

Explanation of the Form:

1. **Report Heading** – Complete all items. Please use actual job classification and not working title. *Social Security numbers are no longer required.*
2. **Section A – Each** factor listed in this section must be checked () in an appropriate column. If additional factors are inserted in the extra spaces provided, be certain they are **job-related**. (The lead person factors are **not** to be referenced in evaluating the performance of non-lead person personnel.)

Each check mark placed in Columns a or b **requires** an explanation in Section C. Check marks in Column d and e must be explained in Section B.
3. **Sections B & C** – You may use the sections provided in the Performance Evaluation Report, or use the sample narrative (Word) document with ample space to identify job strengths or areas needing improvement.
 - **Section B** – Record job strengths or instances of exemplary performance, including details of check marks in Columns d and e. Indicate progress or improvements resulting from the employee's effort to meet previously established goals. This section may be used to set goals for future accomplishments. All attachments must be signed by the evaluator and the employee.
 - **Section C** – Record, in as much detail as possible, the reason(s) for check marks placed in Columns a or b. All attachments must be signed by the evaluator and the employee.
4. **Section D** – The employee signs this section and all attachments to the report. The employee may comment in the space provided, or may use an attachment to include their comments.
 - For CSEA employees only, verify that employee was provided with draft of evaluation and afforded the opportunity to provide input prior to the finalized version by giving date.
 - If the employee prefers not to sign the report for any reason, the evaluator should indicate the employee's decision in this section with a brief comment. Failure to sign does not invalidate the evaluation or the importance of the performance feedback meeting.
5. **Section E** – Each Performance Evaluation Report is to be reviewed and signed in this section by the person preparing and/or delivering the evaluation, and that person's Dean/Department Head or Director before it is forwarded to the Human Resources Department. A signature line is provided for a higher level of review as an option.
6. **OVERALL RATING** – For all employees, check one category that best describes job performance. Consider and weigh the importance and impact of each category since they may not carry equal value and influence in the job.
7. **Section F** – A recommendation is requested with the submission of the **11-month report for a probationary employee**. The final evaluation must be completed **by the beginning of the 11th month of the probationary period**. Unless you indicate otherwise, the employee will complete probation and attain permanency in the job classification.
8. **Distribution Instructions** – After completing and presenting the evaluation to the employee, sign all copies and attachments and obtain other appropriate signature of review
 - Original Staff Performance Evaluation Report with attachments goes to the Human Resources Department for placement in the employee's Official Personnel File.
 - Copy of entire Performance Evaluation Report and attachments are given to the Employee.
 - Retain a copy of entire Performance Evaluation Report with attachments for department files.

DEFINITION OF EVALUATION RATINGS:

Not Satisfactory:	Performance is regularly deficient, unacceptable and seriously impacts job outcomes. Specific comments are required in Section C (or in an attachment) documenting the performance problems and what is needed to bring performance to a satisfactory level. Frequent follow-up evaluations should be given, documenting progress.
Requires Improvement:	Performance periodically fails to be satisfactory and negatively impacts the overall performance level. Specific comments are required in Section C (or in an attachment) documenting the performance problems and what is needed to bring performance to the satisfactory level. Follow-up evaluations should be given, documenting progress.
Satisfactory:	Most employees would be rated in this category. Performance is consistently competent, and may periodically exceed expectations. While not required, positive comments are appropriate in Section B.
Exceeds Expectations:	Total performance is consistently well above standards. Specific comments which justify this rating are required in Section B.
Outstanding:	Overall performance denotes the highest level of consistent accomplishment. Specific comments which justify this rating are required in Section B.
OVERALL RATING	For all employees, check one category that best describes job performance. Consider and weigh the importance and impact of each category since they may not carry equal value and influence in the job.

DEFINITION OF PERFORMANCE FACTORS:

1. **Observance of Work Hours** – Punctuality in observing an established work schedule, rest breaks and lunch periods.
2. **Attendance** – Unauthorized absences/excessive use of leave credits. Are leave requests timely? Are there frequent/extended absences, or a Friday/Monday/holiday pattern?
3. **Knowledge of Work** – A thorough understanding of the mechanics of the work, and applicable policies and procedures. Maintains abilities when changes in technology and policies/procedures occur.
4. **Job Skill Level** – Ability, proficiency and/or dexterity in performing skills needed for job and maintaining a skill level.
5. **Quality of Work** – The level of overall performance – work that is neat, accurate, thorough, complete, and free of errors.
6. **Volume of Acceptable Work** – Closely related to “#5. Quality,” since enough acceptable work must be consistently produced.
7. **Planning, Organizing, Coordinating** – The manner in which assigned duties are approached, methods used in accomplishing work, and pre-planned interactions with other employees and work areas.
8. **Work Judgments** – Recommendations made or actions taken that reflect logic, objectivity and sound judgment.
9. **Interpersonal Relationships** – Refers only to those personal contacts with the public, students or co-workers which are a regular part of the employee’s assigned duties, rather than to individual popularity.
10. **Accepts Responsibility** – Willingness exhibited when given responsibility and the manner in which it is carried out.
11. **Accepts Direction** – A demonstrated acceptance of directions by following them in a professional manner, or offering sound alternatives which are then an accepted option.
12. **Accepts Change** – Being adaptable and flexible to new work conditions, surroundings, equipment, procedures and methods.
13. **Meets Deadlines** – Being capable of meeting established and/or changing deadlines.
14. **Initiative** – Assessing work processes and suggesting methods that are more efficient, productive or economical. Identifies potential problems and works toward solutions.
15. **Operation and Care of Equipment** – Responsible and reasonable operation, care and use of equipment.
16. **Safety Practices** – All employees are expected to observe safety practices that are appropriate to assigned duties.

PERFORMANCE FACTORS FOR LEAD PERSONNEL (Those who lead the work of other employees, not student assistants)

1. **Planning & Organizing** – Ability to anticipate needs, plan and organize the work of others.
2. **Scheduling & Coordinating** – Ability to schedule/reschedule work, meet production demands and adjust for changing priorities.
3. **Training & Instruction** – Orienting new employees, demonstrating methods and procedures, introducing employees to changing materials, methods and techniques.
4. **Productivity** – The volume and quality (results) achieved by the Lead Person and by the employees.
5. **Evaluating Employees** – Are evaluations conducted in a timely manner, and consistently objective, fair, accurate, and supportive?
6. **Judgments & Decisions** – Are judgments and decisions made fairly? Is there a responsible exercise of authority?
7. **Leadership** – Creating a climate which encourages positive attitudes, potential and the meeting of organizational goals.
8. **Operational Economy** – Proper utilization and conservation of time, material, facilities, fiscal and human resources.
9. **Effectively Delegates** – Work is assigned in an effective and thorough manner.
10. **Employee Relations** – Is knowledgeable of policies/procedures and applies them consistently, equally and fairly.