## Staff Performance Review Form

## Version C: Focus on Performance Factors

#### Personal Identification Information

Name of Individual or Team

Department

Job Title

Division or Work Unit

Supervisor

Date of Last Review

Date of this Review

Date for Next Review

Performance Reviewer:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Self** |  | **Team** |  | **Supervisor** |

#### Performance Factors

For each of the factors listed, describe performance in the narrative section. Check the performance development plan box if there is follow up related to this factor that is to be addressed in an action plan. If performance requires improvement, check “needs improvement” and be sure to establish an action plan.

# Productivity and Achievement

1. uses available resources efficiently and effectively
2. plans and organizes work successfully, often addressing multiple tasks simultaneously
3. holds high achievement expectations for self and others
4. performs work on time, accurately, and completely

* produces results which demonstrate an understanding of the mission and goals of the University

|  |  |
| --- | --- |
|  | Needs improvement |

Narrative:

|  |  |
| --- | --- |
|  | See performance development plan |

# Initiative, Responsibility and Self Direction

1. takes responsibility for his or her actions
2. originates action that results in solutions that are based on her or his best thinking
3. takes advantage, in consultation with his or her supervisor, of informal and formal opportunities for training

* works, after initial orientation to the job responsibility, with a minimum of direction and supervision

|  |  |
| --- | --- |
|  | Needs improvement |

Narrative:

|  |  |
| --- | --- |
|  | See performance development plan |

# Competence and Expertise

1. maintains knowledge of the techniques, tools, procedures, policies, and regulations related to his or her area of expertise
2. applies knowledge, skills, and abilities successfully to all tasks
3. expands knowledge and refines skills continuously
4. gains the trust and confidence of others through demonstrating competence and expertise
5. writes and speaks clearly

* uses good judgement

|  |  |
| --- | --- |
|  | Needs improvement |

Narrative:

|  |  |
| --- | --- |
|  | See performance development plan |

# Problem Solving and Continuous Improvement

1. anticipates problems and identifies opportunities for improvements in work processes
2. develops and implements solutions to problems
3. considers the interests and needs of the institution as a whole
4. adapts well to changing assignments and performance expectations
5. regularly and deliberately assesses results and establishes new objectives
6. demonstrates flexibility and creativity in meeting objectives, considering new and untested approaches

|  |  |
| --- | --- |
|  | Needs improvement |

Narrative:

|  |  |
| --- | --- |
|  | See performance development plan |

# Cooperation and Collaboration

1. enlists others, as needed and appropriate, to accomplish objectives
2. communicates clearly what she or he wants and expects from others
3. demonstrates respect for others and values their thoughts and ideas
4. shares his/her knowledge and skills freely with others

* understands how his or her role and responsibilities relate to the University’s success

|  |  |
| --- | --- |
|  | Needs improvement |

Narrative:

|  |  |
| --- | --- |
|  | See performance development plan |

# Service Orientation and Delivery

1. willingly provides the highest level of appropriate service
2. meets or exceeds the warranted needs and expectations of those who are supported by the work
3. develops respectful relationships with and is accessible to those served by the work
4. anticipates the needs of those who are served by the work

|  |  |
| --- | --- |
|  | Needs improvement |

Narrative:

|  |  |
| --- | --- |
|  | See performance development plan |

**And/Or Other Performance Criteria (repeat as necessary):**

|  |  |
| --- | --- |
|  | Needs improvement |

Narrative:

|  |  |
| --- | --- |
|  | See performance development plan |

**Licenses and Certification**

Use this section to indicate if licenses or certifications required for the performance of this position are current. These might include Washington State Driver’s License, Physician Assistant License, Boiler Engineer Certification, etc. If licenses and certifications do not apply to this position, mark the N/A box. In the event that licensing or certification is not current, develop an action plan. The narrative space may be used to identify types, status and dates of licenses or certificates. Certification received in areas not required for job performance would be addressed under noteworthy work performed, projects or accomplishments.

Are required licenses and certifications current?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Yes |  | No |  | Not Applicable |

Narrative:

|  |  |
| --- | --- |
|  | See performance development plan |

**Have the supervisor and staff member reviewed the job description for this position and updated it if needed?**

|  |  |  |  |
| --- | --- | --- | --- |
|  | Yes |  | No |

*Please return an electronic copy to* [*hr@pugetsound.edu*](mailto:hr@pugetsound.edu) *with the review date in the upper left hand corner*

**Has this staff member completed the online harassment prevention tutorial within the last two years?**

|  |  |  |  |
| --- | --- | --- | --- |
|  | Yes |  | No |

*The tutorial is online at* [*http://www.pugetsound.edu/about/offices-services/human-resources/harassment-prevention-tutorial/*](http://www.pugetsound.edu/about/offices-services/human-resources/harassment-prevention-tutorial/)*.*

#### Summary of Performance

This section is available to summarize the staff member’s overall performance noting whether it generally meets standards or if there is significant cause for concern about the staff member’s performance. When giving examples, be as specific as possible.

#### Noteworthy Work Performed, Projects, and/or Accomplishments

Describe noteworthy projects or work performed during this review period. This is an opportunity for the staff member or the supervisor to highlight significant examples of skills, accomplishments and abilities.

**Comments from Other Supervisory Personnel**

Other individuals who have some level of supervisory responsibility for this individual’s position are invited to add comments about the staff member’s performance during this development appraisal period. For example, an academic department head might invite other members of the faculty in the department to comment on the performance of the staff member who provides clerical and secretarial support to the faculty. It is important that the staff member know ahead of time who will be providing comments in this process.

#### Supervisor’s Signature and Date

#### Staff Member’s Comments

This space is for staff member comments relative to the official performance appraisal that is developed by the supervisor following the performance interview with the staff member. Once the staff member has signed the official review and had an opportunity to comment, it will be routed to the next level supervisor for signature and comment, and then sent to Human Resources for the staff member’s personnel file.

|  |  |  |  |
| --- | --- | --- | --- |
|  | I have chosen not to provide further comments |  | I have chosen to provide comments as follows: |

*Your signature does not mean you agree with this document, only that you have reviewed it.*

Staff member’s Signature and Date

**Next Level Supervisor’s Comments**

This space is available for the next level supervisor to add comments concerning the staff member’s development during this review period, if any.

*Your signature indicates that you have reviewed this document and that all parts including applicable performance development plans are complete.*

Next Level Supervisor Signature and Date