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**Performance Evaluation Form**

**Office Support Staff Form**

|  |
| --- |
| Employee Name: |
| Title: |
| Department: |
| Supervisor: |

**EVALUATION PERIOD:**

From (Mo/Yr): \_\_\_\_\_\_\_\_\_\_\_

To (Mo/Yr): \_\_\_\_\_\_\_\_\_\_\_\_

TYPE OF APPRAISAL:

Annual: \_\_\_\_\_\_\_\_\_\_\_\_\_

Provisional: \_\_\_\_\_\_\_\_\_\_\_\_\_

OVERALL SCORE: \_\_\_\_\_\_\_\_\_

Loyola University Maryland’s Performance Evaluation Form is designed to link employee performance to Loyola’s mission and values as reflected in the Jesuit tradition and to provide guidance and consistency to the evaluation process. It assists the supervisor in making decisions about merit increases, promotions and continuing employment. It should be used to summarize and evaluate the employee’s overall performance for the past year, to establish results to be achieved for specific tasks or projects for the next year, and to identify professional development goals to enable the employee to enhance performance in their current position or to prepare them for future growth.

**Procedures**

1. The supervisor encourages the employee to complete a self-evaluation which will be used as input in the formal evaluation.
2. The supervisor prepares the evaluation. Any category where employees are not meeting expectations must be addressed with comments.
3. The second level supervisor approves the evaluation.
4. The supervisor discusses the evaluation with the employee and adds final comments.
5. The employee adds comments and signs off. The supervisor signs off and forwards it to the human resources office for the employee file.

***Questions regarding Loyola’s performance management process can be addressed to Human Resources at*** [***performancereview@loyola.edu***](mailto:performancereview@loyola.edu) ***or by calling at 410-617-2354.***

**Performance Levels**

The performance levels described below are consistent with those used to determine merit increase ranges. Use these descriptions/levels when completing this section. Select the rating that best describes performance for each competency.

**EXCEPTIONAL (5):** Consistently exceeds all relevant performance standards. Provides leadership, fosters teamwork, is highly productive, innovative, responsive and generates top quality work.

**EXCEEDS EXPECTATIONS (4)**: Consistently meets and often exceeds all relevant performance standards. Shows initiative and versatility, works collaboratively, has strong technical & interpersonal skills or has achieved significant improvement in these areas.

**MEETS EXPECTATIONS (3):** Meets all relevant performance standards. Occasionally exceeds desired results or objectives in one or more areas.

**BELOW EXPECTATIONS (2):** Sometimes meets the performance standards. Seldom exceeds and often falls short of desired results. Performance has declined significantly, or employee has not sustained adequate improvement, as required since the last performance review or performance improvement plan.

**NEEDS IMPROVEMENT (1)**: Consistently falls short of performance standards.

**Knowledge of Job**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Competency** | **5** | **4** | **3** | **2** | **1** | **NA** |
| Understands department processes/procedures/operations |  |  |  |  |  |  |
| Answers/directs questions appropriately |  |  |  |  |  |  |
| Operates general office equipment (phones, faxes, copiers, etc.) effectively |  |  |  |  |  |  |
| Effectively uses computer software |  |  |  |  |  |  |
| Appropriately keeps supervisor informed |  |  |  |  |  |  |

**Planned Skill Development:**

**Productivity/Quality**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Competency** | **5** | **4** | **3** | **2** | **1** | **NA** |
| Originates and maintains appropriate office supply inventory |  |  |  |  |  |  |
| Organizes/plans assignments |  |  |  |  |  |  |
| Successfully manages workflow |  |  |  |  |  |  |
| Develops and utilizes effective follow-up systems |  |  |  |  |  |  |

**Planned Skill Development:**

**Dependability**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Competency** | **5** | **4** | **3** | **2** | **1** | **NA** |
| Meets attendance standards |  |  |  |  |  |  |
| Meets punctuality standards |  |  |  |  |  |  |
| Complies with departmental/University policies and standards |  |  |  |  |  |  |
| Meets schedules and deadlines for all assignments |  |  |  |  |  |  |

**Planned Skill Development:**

**Initiative**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Competency** | **5** | **4** | **3** | **2** | **1** | **NA** |
| Suggests ways to improve operations |  |  |  |  |  |  |
| Willingly accepts new assignments |  |  |  |  |  |  |
| Adapts to changes in routine |  |  |  |  |  |  |
| Actively seeks additional assignments |  |  |  |  |  |  |
| Identifies and resolves problems |  |  |  |  |  |  |

**Planned Skill Development:**

**Customer Service**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Competency** | **5** | **4** | **3** | **2** | **1** | **NA** |
| Is welcoming, courteous and helpful to callers and visitors |  |  |  |  |  |  |
| Responds to constituent requests in a timely manner |  |  |  |  |  |  |
| Maintains composure when addressing constituent problems or concerns |  |  |  |  |  |  |

**Planned Skill Development:**

**Interpersonal Skills**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Competency** | **5** | **4** | **3** | **2** | **1** | **NA** |
| Accepts constructive criticism and instruction in a cooperative manner |  |  |  |  |  |  |
| Communicates clearly and effectively |  |  |  |  |  |  |
| Maintains effective working relationships |  |  |  |  |  |  |
| Demonstrates commitment to Loyola’s vision, mission and core values |  |  |  |  |  |  |

**Planned Skill Development:**

**Lead Position**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Competency** | **5** | **4** | **3** | **2** | **1** | **NA** |
| Effectively oversees assigned work and progress of others |  |  |  |  |  |  |
| Assists employees with solving routine problems |  |  |  |  |  |  |
| Maintains proper workflow |  |  |  |  |  |  |
| Distributes workload equitably |  |  |  |  |  |  |
| Effectively manages and rates the performance of others |  |  |  |  |  |  |

**Planned Skill Development:**

**Office Support Duties**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Competency** | **5** | **4** | **3** | **2** | **1** | **NA** |
| Accurately maintains department budget |  |  |  |  |  |  |
| Effectively maintains and manages calendars |  |  |  |  |  |  |
| Accurately and efficiently makes travel arrangements |  |  |  |  |  |  |
| Effectively coordinates meetings/events |  |  |  |  |  |  |
| Accurately transcribes minutes and notes |  |  |  |  |  |  |
| Accurately records and promptly delivers messages |  |  |  |  |  |  |
| Maintains office equipment |  |  |  |  |  |  |

**Planned Skill Development:**

**Supervision of Student Employees**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Competency** | **5** | **4** | **3** | **2** | **1** | **NA** |
| Appropriately interviews and selects students |  |  |  |  |  |  |
| Effectively trains student employees |  |  |  |  |  |  |
| Effectively delegates work to student employees |  |  |  |  |  |  |
| Accurately manages student time sheets |  |  |  |  |  |  |
| Effectively manages and rates the performance of student employees |  |  |  |  |  |  |

**Planned Skill Development:**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **OVERALL EVALUATION SCORE** | ***5*** | ***4*** | ***3*** | ***2*** | ***1*** |

**Instructions for Development Plans**

Describe the areas that need to be improved or describe suggestions for developing and reinforcing strengths in the Development Plan section. A Development Plan is required of any areas with a score of less than “3”. Contact Human Resources to learn about available training courses/programs.

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| --- |
| **Title and Development Plan** |
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|  |
|  |
|  |

**Comments**

This section is for optional employee comments.

**Employee Comments:**

**Supervisor Comments:**

**Signatures**

My supervisor has reviewed this document with me. My signature indicates that I have reviewed this appraisal, but does not imply my agreement or disagreement with this appraisal.

Employee: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_

Immediate Supervisor: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Next Level Supervisor: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_

***Please return the completed form to the human resources office. Thank you.***