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**Performance Evaluation Form**

  **Supervisor Form**

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| 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*** ***or by calling at 410-617-2354.***

**Definition of Ratings**

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. Active in industry-related professional and/or community groups.

**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.

**Goal Achievement**

Use this section to summarize results of goals that were established for this review period. Select the rating level best describes the extent to which expectations were met for each goal. In the *Results Achieved* column, specify results achieved, to what extent expectations were met and any contributing factors.

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| **GOALS/PERFORMANCE STANDARDS** | **RESULTS ACHIEVED** | **RATING** | **WEIGHT** |
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| **OVERALL SCORE SECTION 1** |  |

**Core Competencies**

Circle a rating for the performance level demonstrated by the employee during the review period for the following competencies. Use the *Planned Skilled Development* column to address plans for improvement or to develop and reinforce strengths.

**Job Skills**

Possesses sufficient job skills and knowledge to perform the job in a competent manner. Is able to demonstrate skills and knowledge in day-to-day situations. This is distinctly different from those individuals who lack sufficient job skills or knowledge to meet the job requirements or who have the skills and knowledge, yet struggle to apply them to day-to-day situations on the job.

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| 5 | Has expert level skills and knowledge |
| 4 | Has strong skills and knowledge |
| 3 | Has sufficient skills and knowledge to perform the job competently.  |
| 2 | Acquiring the skills and knowledge needed to perform the job competently. Will benefit from further training.  |
| 1 | Does not possess the skills and knowledge needed to perform the job competently.  |
| N/A | Non Applicable |

Comments/Planned Skill Development:

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**Quality of Work**

Has established a track record of producing work that is highly accurate, demonstrates attention to detail and reflects well on the organization. Is personally committed to high quality work and encourages others to have similar standards. This differs from those who cannot be relied upon to produce high quality work, play little attention to detail, show pride in a job well done and/or set a poor example for co-workers or direct reports.

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| 5 |  Far exceeds expectations in terms of producing high quality work. Excellent attention to detail.  |
| 4 | Exceeds expectations in terms of producing high quality work. Very good attention to detail. |
| 3 | Meets expectations in terms of producing high quality work. Good attention to detail. |
| 2 | Slightly below expectations in terms of producing high quality work. Occasionally lacking in attention to detail. |
| 1 | Below expectations in terms of producing high quality work. Lacks attention to detail. |
| N/A |   |

Comments/Planned Skill Development:

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**Productivity**

Meets or exceeds productivity standards that have been established for their organizational level or position. Has successfully combined skills, ability and effort level to ensure that expectations related to results/output are achieved. This is in contrast to those individuals who fail to meet standards due to a shortfall in essential skills, ability or the level of energy/effort required.

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| 5 | Far exceeds standards of productivity.  |
| 4 | Exceeds standards of productivity.  |
| 3 | Meets standards of productivity. |
| 2 | Slightly below standards of productivity.  |
| 1 | Far below standards of productivity  |
| N/A | Not Applicable |

Comments/Planned Skill Development:

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**Dependability**

Makes and fulfills commitments. Has established a pattern of working independently, meeting reasonable deadlines, and accepting responsibility for their actions. Willingly makes promises and fully intends to keep them. Arrives at work on time and ready to contribute. Shows up for meetings well-prepared. This contrasts with individuals who have proven to be unreliable when others have counted on them to show up on time, meet deadlines and expectations, or arrive prepared and ready to contribute.

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| 5 | Exceeds expectations in terms of workload, meeting deadlines, meeting attendance requirements and accepting responsibility for actions. Excellent ability to work independently. |
| 4 | Slightly above expectations in terms of workload, meeting deadlines, and accepting responsibility for actions. Very good ability to work independently. |
| 3 | Meets expectations in terms of workload, meeting deadlines, and accepting responsibility for actions. Good ability to work independently. |
| 2 | Slightly below expectations in terms of workload, meeting deadlines, and accepting responsibility for actions. Not always able to work independently. |
| 1 | Below expectations in terms of workload, meeting deadlines, and accepting responsibility for actions. Not able to work independently. |
| N/A | Not Applicable |

Comments/Planned Skill Development:

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**Relationship Building/Networking**

Builds rapport and develops alliances with a broad range of people. Adjusts communication style to meet the needs of individuals at various organizational levels and to meet the needs of clients. Forms alliances by demonstrating concern and respect for others, as well as by highlighting common interests and aspirations. Leave others feeling that he/she will be a trusted ally and is careful to act in ways that reinforce that trust over time. This is in contrast with the behavior of individuals who tend to interact with a relatively narrow range of people or who fail to adjust their communication styles to accommodate others. It is also quite different than behavior that leaves the impression that the person is seeking to advance their own narrow agendas and interests.

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| 5 | Excellent ability to build rapport and develop alliances with a variety of people. Always modifies communication style to deal with different types of people in an appropriate manner. |
| 4 | Very good ability to build rapport and develop alliances with a variety of people. Usually modifies communication style to deal with different types of people in an appropriate manner. |
| 3 | Able to build rapport and develop alliances with a variety of people. Able to modify communication style to deal with different types of people in an appropriate manner. |
| 2 | Limited ability to build rapport and develop alliances with a variety of people. Has difficulty modifying communication style to deal with different types of people and situations. |
| 1 | Does not attempt to build rapport or develop alliances with others. Unable to modify communication style to deal with different types of people and situations. |
| N/A | Not Applicable |

Comments/Planned Skill Development:

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**Communication**

Communicates effectively and appropriately. Uses good judgment as to what to communicate to whom as well as the best way to get that accomplished. Speaks in a clear and credible manner, selecting the right tone for the situation and audience. Listens to others and allows them to make their point. This is quite different than those who tend to select the wrong means of communicating, or who communicate information to inappropriate people. It also contrasts with those whose messages are not clear or lack credibility, as well as those who demonstrate poor listening skills and are unreceptive to feedback.

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| 5 | Always modifies communication style to deal with different types of people in an appropriate manner. Always expresses facts and ideas clearly, in a credible manner. Always uses an appropriate tone. Displays excellent judgment as to what information should be communicated. Listens to others, and elicits feedback. |
| 4 | Usually expresses facts and ideas clearly, in a credible manner. Uses an appropriate tone.Displays very good judgment as to what information should be communicated. Listens to others, and often elicits feedback. |
| 3 | Able to express facts and ideas clearly, in a credible manner. Usually uses an appropriate tone. Displays good judgment as to what information should be communicated. Listens to others, and sometimes elicits feedback. |
| 2 | Rarely able to express facts and ideas clearly, in a credible manner. Does not always use an appropriate tone. Has difficulty judging what information should be communicated. Does not always listen to others. Rarely elicits feedback. |
| 1 | Unable to express facts and ideas clearly. This limits credibility. Often uses an inappropriate tone. Exercises poor judgment in determining information to share with others. Unwilling tolisten to others or accept feedback |
| N/A | Not Applicable |

Comments/Planned Skill Development:

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**Customer Focus**

Personally demonstrates customers are a high priority. Identifies customer needs and expectations and responds to them in a timely and effective manner. Anticipates and prevents delays or other things that can adversely affect the customer. Keeps customers informed about the status of pending actions and inquires about customer satisfaction with products or services. This is in sharp contrast to behavior patterns that tend to disappoint customers, leave them feeling forgotten and unimportant or that otherwise result in unmet needs or expectations.

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| 5 | Considers customers to be a priority, and works closely with them to identify and anticipate their needs. Maintains frequent communication with the customer to set realistic expectations.Consistently ensures that their needs and expectations are met. |
| 4 | Considers customers to be a priority, and listens to their needs. Is frequently able to anticipate their needs. Maintains communication with the customer to set realistic expectations. Strives to ensure that their needs and expectations are met. |
| 3 | Usually makes customers a priority, and has been able to identify their needs. Attempts to set realistic expectations. Works toward meeting customers' needs and expectations. |
| 2 | Has difficulty anticipating and identifying customer needs, and is not always able to ensure that their needs are met. Must work more closely with customers. |
| 1 | Unable to anticipate and identify customer needs. Does not work closely with customers to ensure that their needs are met. |
| N/A | Not Applicable |

Comments/Planned Skill Development:

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**Initiative**

Recognizes opportunities and initiates actions to capitalize on them. Looks for new and productive ways to make an impact. Demonstrates this characteristic when it comes to generating new ideas or processes, capitalizing on new business opportunities, seeking out and taking on increasing responsibility or resolving problems as they occur. Uses sound judgment about when to take action and when to seek guidance or permission. This is in contrast to those who fail to notice opportunities, wait to be asked or instructed before taking action, seldom offer new ideas or express reservations about taking on additional responsibilities.

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| 5 | Consistently takes the initiative to resolve problems with minimal assistance from management. Has taken on new responsibilities, and acted on opportunities. |
| 4 | Has taken the initiative to resolve problems with minimal assistance from management. Willing to take on new responsibilities and act on opportunities. |
| 3 | Has taken the initiative to look for resolutions to problems, involving management at times. Usually willing to take on new responsibilities and act on opportunities. |
| 2 | Requires encouragement and input from managers before taking on new responsibilities or looking for solutions to problems. Hesitant to take on new responsibilities or act on opportunities. |
| 1 | Does not demonstrate initiative to solve problems or take on new responsibilities. Very reluctant to take on new responsibilities or act on opportunities. |
| N/A | Not Applicable |

Comments/Planned Skill Development:

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**Analytical Thinking**

Breaks down problems and issues into sub-components and then assesses the costs, benefits and risks of various options prior to selecting a particular approach. This contrasts with the behavior of individuals who tend to attack problems without a thorough examination of all important components and ramifications; who fail to weigh the costs, benefits and risks associated with various alternatives; and/or who are unable to explain or justify their decisions in a logical and systematic fashion.

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| 5 | Excellent analytical skills. Thoroughly analyzes the costs, benefits, opportunities and risks of each potential solution. |
| 4 | Very good analytical skills. Analyzes the costs, benefits, opportunities and risks of each potential solution. |
| 3 | Good analytical skills. Takes a role in analyzing the costs, benefits, opportunities and risks of each potential solution. |
| 2 | Developing analytical skills. Needs to take more time to analyze the costs, benefits, opportunities and risks of each potential solution. |
| 1 | Poor analytical skills. Does not take time to analyze the costs, benefits, opportunities and risks of each potential solution. |
| N/A | Not Applicable |

Comments/Planned Skill Development:

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**Integrity**

Demonstrates commitment to Loyola’s vision, mission and core values. Acts in ways that demonstrate personal integrity and serves as a positive example of why others should trust the motives of the organization. Views themselves as a reflection of the organization by following through on commitments and accepting ownership of any mistakes he or she might make. Leaves others with the clear impression that integrity is a core value at this organization. This is in contrast to individuals who make commitments that go unmet, fail to acknowledge their role in disappointing events, or whose actions (or inaction) leave others with doubts about the level of trust that should be placed in the organization.

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| 5 | Exemplary sense of responsibility and commitment. Can always be relied upon to follow through on commitments and promises. Willing to admit to mistakes. |
| 4 | Very strong sense of responsibility and commitment. Can be relied upon to follow through on commitments and promises. Willing to admit to mistakes. |
| 3 | Good sense of responsibility and commitment. Usually follows through on commitments and promises, with a few small delays. When approached, is willing to admit to mistakes. |
| 2 | Occasionally displays a lack of responsibility and commitment. Cannot always be relied upon to follow through on commitments and promises. Hesitant to admit to mistakes. |
| 1 | Does not display a sense of responsibility or commitment. Often fails to follow through on commitments. Will not admit to mistakes. |
| N/A | Not Applicable |

Comments/Planned Skill Development:

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**Change Management**

Proactively assesses the need for change, seeing to it that appropriate resources are available to facilitate changes, considers factors that will support or hinder change initiatives, enthusiastically promote change in terms of the expected benefits, as well as removing or lowering the impact of potential obstacles. This is clearly different from those who tend to do so in a matter that reduces the probability that change will be successful. Examples of behavior on this end of the continuum include failing to allocate appropriate resources, creating obstacles to change, and tending to put more energy and effort into resisting change.

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| 5 | Exceeds expectations in terms of identifying obstacles to change, and taking steps to remove obstacles and implement change. |
| 4 | At times, has exceeded expectations in terms of identifying obstacles to change, and taking steps to remove obstacles and implement change.  |
| 3 | Meets expectations in terms of identifying obstacles to change, and taking steps to remove obstacles and implement change.  |
| 2 | Lacks the experience to identify obstacles to change. Rarely takes steps to remove obstacles and implement change. |
| 1 | Unable to identify obstacles to change, and does not take steps to remove obstacles or implement change.  |
| N/A | Not Applicable |

Comments/Planned Skill Development:

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**Creating a Challenging Environment**

Creates an environment that ensures challenging goals that align with employee capabilities, organizational needs and goals. This is achieved by ensuring that each employee; accepts goals that involve a challenging (yet realistic) level of risk; is motivated and encouraged to achieve goals; and believes that the goals are attainable with a reasonable level of effort. This contracts with managers or leaders who; create or accept goals that are either too cautious or too challenging to attain; fail to motivate or encourage direct reports; and/or communicate a lack of confidence in one or more organizational goals.

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| 5 | Always works with employees to help them set attainable, yet challenging goals. Actively encourages employees to work towards these goals. |
| 4 | Frequently works with employees to help them set attainable, yet challenging goals. Encourages employees to work towards these goals. |
| 3 | Occasionally works with employees to help them set attainable, yet challenging goals. Often encourages employees to work towards these goals. |
| 2 | Rarely works with employees to help them set attainable, yet challenging goals. Does not usually encourage employees to work towards these goals. |
| 1 | Does not work with employees to help them set goals. Does not offer any encouragement to employees. |
| N/A | Not Applicable |

Comments/Planned Skill Development:

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**Teamwork**

Is an effective team player who adds complementary skills and contributes valuable ideas, opinions and feedback. Communicates in an open and candid manner and can be counted upon to fulfill any commitments made to others on the team. This is distinctively different from those who withhold ideas and opinions, offer ideals or opinions that rarely add value to team discussions, have established a track record with many unmet commitments and/or have not contributed skills that complement the skills of others on the team.

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| 5 | Strong team player. Regularly conveys good ideas and opinions to the team. Has a positive impact on the team dynamics. Adds many complementary skills to the team. |
| 4 | Very good team player. Sometimes conveys good ideas and opinions to the team. Has potential to have a positive impact on team dynamics. Adds several complementary skills to the team. |
| 3 | Works well with others. Has limited impact on team dynamics. Adds a complementary skill to the team. |
| 2 | Does not work well in a team environment. Prefers to work independently. Lacks confidence to contribute ideas and opinions, and does not have a positive impact on team dynamics. Does not add a complementary skill to the team. |
| 1 | Does not work well in a team environment and has a negative impact on the exchange of ideas and opinions. Does not make a positive contribution to the team.  |
| N/A | Not Applicable |

Comments/Planned Skill Development:

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**Managing Employee Performance**

Takes action to ensure that employees fully understand their roles, responsibilities and performance standards/expectations and provides ongoing feedback and support as employees strive to achieve expectations. Engages in two-way conversations throughout the year that ensure an up-to-date understanding of expectations, performance gaps and actions required to close any gaps. This is quite different from failing to adequately communicate expectations, being unaware of (or choosing to ignore) performance gaps, providing little or no support in overcoming barriers and failing to provide regular, ongoing feedback to employees.

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| 5 | Always works closely with employees to ensure they understand their roles and responsibilities. Maintains an excellent working relationship with employees, and works with them to resolve performance issues. |
| 4 | Usually works closely with employees to ensure they understand their roles and responsibilities. Maintains a very good working relationship with employees, and works with them to resolve performance issues. |
| 3 | Meets regularly with employees to ensure they understand their roles and responsibilities. Maintains a good working relationship with employees, and works with them to resolve performance issues. |
| 2 | Does not always maintain regular communication with employees. At times, employees are unclear about their responsibilities and the standard that is expected of them.  |
| 1 | Does not maintain good communication with employees. Employees are unclear about their responsibilities and the standard that is expected of them.  |
| N/A | Not Applicable |

Comments/Planned Skill Development:

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**Cross-Cultural Sensitivity**

Demonstrates an awareness of, and sensitivity to, the needs and concerns of individuals from different cultures. Makes adjustments in how he or she communicates out of respect for cultural differences and minimizes the number of cross-cultural misunderstandings. This is quite different from those individuals who invest little or no time attempting to understand cultural differences and whose efforts to communicate across cultures often leads to misunderstandings.

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| 5 | Always displays sensitivity to the needs of different cultures. Makes extra effort to learn about other cultures. |
| 4 | Displays sensitivity to the needs of different cultures. Makes an effort to learn about other cultures. |
| 3 | Usually displays sensitivity to the needs of different cultures. Willing to learn about other cultures. |
| 2 | Tries to display sensitivity to the needs of different cultures, but needs to take time to learn about their differences. |
| 1 | Does not display sensitivity to the needs of different cultures. Unwilling to learn about the needs and concerns of other cultures. |
| N/A | Not Applicable |

Comments/Planned Skill Development:

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| **OVERALL EVALUATION SCORE** | ***5*** | ***4*** | ***3*** | ***2*** | ***1*** |
| The level of overall performance for sections 1 and 2 |  |  |  |  |  |

**New Goals**

Identify a minimum of two new objectives. These objectives must be those the employee agreed to accomplish over the coming year and address any one of the following areas:

Project Goals are specific assignments to participate in or manage ongoing or future projects. When setting project oriented goals, outline the scope of the role the employee is to play, lists resources and completion time frame and define the desired result.

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| **GOALS/PERFORMANCE STANDARDS** | **WEIGHT** |
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**Provisional Employee Status**

This section is completed for provisional employees only. Please choose the appropriate status.

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| The status checked below will be effective: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Date)  |
|  | Regular (as defined in the policy manual) |
|  | Dismissal (The dismissal date should be no later than the end of the provisional period) |
|  | Request for extension of the provisional period until \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. (The length of the extended provisional period should not exceed 30 calendar days for staff employees and 180 calendar days for administrators). |

**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.***