

University of Oklahoma Office of Human Resources
Sample Performance Evaluation and Development Planning Document For Monthly Staff
For use with the administrative, professional, managerial, other monthly (exempt) staff.

1. The original Performance Evaluation and Development Planning Document is maintained in the departmental file.
2. The Evaluator will need to make copies for the employee and for the departmental file.
3. The original, completed "Staff Performance Evaluation Summary Report" needs to be sent to the Office of Human Resources.

Employee's Name:		EMPL ID:	Date of Employment:
Job Title:		Position Number:	Time In Position (Years and Months):
Department Name:			Department ID
Review Period From:	Review Period To:	Supervisor:	Secondary Level Reviewer:
Type of Review: <input type="checkbox"/> Annual <input type="checkbox"/> Six Month (new hire or job change) <input type="checkbox"/> Other (specify):			Date:

Performance Evaluation Criteria Key	
N/A	Items NOT APPLICABLE to the position or unable to be observed in the timeframe.
U	UNSATISFACTORY work.
N	Work performance NEEDS improvement. Employee is having performance problems.
M	Work performance MEETS normal work requirements. The employee completes tasks as assigned.
B	Performs BEYOND normal work requirements.

Knowledge of Work - Extent to which the accomplishment of the primary mission of the position or job function is attained and the information is processed and applied.					
	N/A	U	N	M	B
1. Competent and understands duties and related work assignments.					
2. Proactive dealing with critical issues and details.					
3. Work produced meets quality requirements of accuracy, thoroughness, and efficiency.					
4. Volume of work is consistent and timely.					
5. Overcomes obstacles to meet objectives.					
6. Promotes the mission of the organization.					
Notes:					

Leadership & Self Development - Ability and extent to which the individual is resourceful, establishes clear focus and direction, accepts responsibilities, contributes as a team player, manages tasks, seeks knowledge, and generates solutions.					
	N/A	U	N	M	B
1. Exhibits confidence in self and others.					
2. Establishes clear focus and direction and has a plan of action.					
3. Consults, makes decisions and takes action.					
4. Accepts responsibility.					
5. Delegates tasks and acknowledges authority to accomplish task.					
6. Regularly provides constructive and positive feedback.					
7. Actively supports, promotes, and seeks training and development opportunities.					
8. Sets clear, achievable objectives and attains results.					
Notes:					

Project & Financial / Budget Management - Ability and extent to which the individual defines a project, gathers and analyzes relevant information, develops and/or contributes to the development of realistic budget parameters.

	N/A	U	N	M	B
1. Clearly defines project and determines required resources.					
2. Establishes goals and milestones.					
3. Establishes effective procedures, alternatives, liaisons, and timelines.					
4. Coordinates and monitors group or team processes.					
5. Operates within budget parameters.					
6. Develop and implements cost saving measures or promotes revenue generation where appropriate.					
7. Projects are completed on time and within budget guidelines.					
8. Sets clear, achievable objectives and attains results.					
9. Overcomes obstacles to meet objectives.					
10. Regularly provides constructive and positive feedback.					
Notes:					

Interpersonal Oral and Written Communication - Demonstrates the ability to promote a positive work environment by selecting and eliciting appropriate and pertinent communication methods and information.

	N/A	U	N	M	B
1. Speaking is clear, concise, and organized.					
2. Selects the most appropriate and effective communication method.					
3. Writing is clear, concise and organized.					
4. Adjusts information and delivery to the target audience.					
5. Demonstrates effective group presentation skills.					
6. Keeps supervisor and others informed.					
7. Comprehends and can interpret oral/written communications.					
8. Exhibits reflective listening skills.					
9. Responds in a positive manner to feedback.					
10. Provides clear, concise, and organized feedback.					
11. Ability to deal with conflict constructively.					
12. Affectively participates as a team member.					
13. Maintains confidentiality.					
Notes:					

Time and Attendance - Punctual and present to perform assigned work load.

	N/A	U	N	M	B
1. Punctual for work.					
2. Punctual for meetings.					
3. Present for assigned on duty timeframe.					
4. Present for meetings.					
Notes:					

Health and Safety - Uses best practices to assist in ensuring the health and safety of self and others.

	N/A	U	N	M	B
1. Is attentive to potential health and safety risks.					
2. Monitors workplace for self and other employees.					
3. Makes recommendations for improving safe work practices.					
4. Follows established safe work practices.					
5. Understands process for reporting injuries.					
Notes:					

Overall Rating of Employee - Overall rating is considered for each area appraised, is normally an average of all areas combined, and is supported by the evaluation content. The employee's overall rating for this period is:

- Unsatisfactory work
- Work performance needs improvement
- Work performance meets normal work requirements
- Performs beyond normal work requirements

Comments:

Development Plan - To be completed by the appraiser and employee together during performance evaluation session.

1. Major strengths: What elements of performance contributed most to employee's success?

2. What areas of performance need the most improvement?

3. What actions should be taken by either employee or supervisor to improve the employee's performance?

The employee's signature does not indicate agreement with the evaluation. It is acknowledgement that the individual has been given an evaluation. Any disagreement or issues about the evaluation may be submitted within five (5) working days of receiving the evaluation. These comments will become a permanent part of the evaluation and development document. When this occurs, the employee may also request a ninety (90) day re-evaluation if appropriate.



Staff Member's Signature

Date

Evaluation Conducted By:

Title:

Signature:

Date:

Comments:

Evaluation Reviewed By:

Title:

Signature:

Date:

Comments: