



2017 EMPLOYEE PERFORMANCE EVALUATION

Purpose

- Provide an overall assessment of performance in compliance with university HR policy and procedures
- Document past performance; evaluate supervisory effectiveness for employees who have supervisory responsibilities
- Align individual actions with university values and the Lima mission and strategic plan
- Set goals for the coming evaluation period

Instructions

Employee

- Review job description and goals that were set at the beginning of the evaluation period
- Complete Section I of the Performance Evaluation Form
- Complete Section III of the Performance Evaluation Form
- Submit form to supervisor via email as an attachment
- Meet with supervisor to discuss 1) performance for the past evaluation period and 2) expectations and priorities for the next evaluation period

Supervisor

- Review all documentation relevant to the employee's performance over the past year
- Complete Sections I, II (if applicable), and III of the Annual Performance Evaluation Form
- Assign performance rating scores in the two sections under 'Overall Rating of Performance'
- Meet with employee to discuss 1) performance for the past evaluation period and 2) expectations and priorities for the next evaluation period
- Sign and obtain employee signature on both the job description and the evaluation form
- Submit completed evaluation form and signed job description to Melissa Coldiron, HR Manager by **July 1**



2017-18 EMPLOYEE PERFORMANCE EVALUATION

Name:	Job Title:
Supervisor:	Evaluation Period: June 1, 2017– May 31, 2018

SECTION I- SUMMATIVE REPORT

To be completed by employee:

Employee Self-Assessment of performance of job duties and goals set during previous evaluation (concise summary; if more space is needed attach additional notes)

To be completed by supervisor:

Supervisor assessment of performance of job duties, goals set during previous evaluation and how well employee demonstrated university values in the performance of duties (concise summary supported by one or more examples).



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SECTION II- Did employee have supervisory responsibilities?

_____ Yes (Complete Section II)

_____ No (Go to Section III)

To be completed by supervisor:

Did the unit or team that reports to this supervisor function well and achieve timely and effective work outcomes? Provide one or more examples. Set one or more goals for the future.

To the best of your knowledge, did the supervisor effectively abide by HR policies and procedures in managing his or her staff? Provide one or more examples. Set one or more goals for how employee's knowledge and expertise can be strengthened in this area.

Did the supervisor effectively encourage teamwork within the work group, across Ohio State Lima departments, and the university? Provide one or more examples. Set one or more goals for the future.



OVERALL RATING of PERFORMANCE FOR 2017-2018

Instructions: Select the category (Excels, Achieves, Inconsistently Achieves, or Does Not Achieve) that best reflects the employee’s performance over the past year. Then assign the rating score (for example, 2.25, 1.0, etc.) that best reflects the level of performance for the section below.

Performance		Rating
Excels Ratings from 2.25 to 3.00 (2.25, 2.50, 2.75, 3.00)	Exceeded workload expectations. Met deadlines and commitments with no significant errors that were within the employee’s control. Accepted increased level of responsibility for actions and decisions within the scope of position.	
Achieves Ratings from 1.25 to 2.00 (1.25, 1.50, 1.75, 2.00)	Achieved workload expectations. Met deadlines and commitments with few errors that were within the employee’s control. Accepted responsibility for actions and decisions.	
Inconsistently Achieves Ratings from .25 to 1.00 (.25, .50, .75, 1.00)	Did not consistently achieve workload expectations. Did not consistently meet deadlines and commitments. Work consistently contained errors that were within the employee’s control. Did not consistently accept responsibility for actions and decisions.	
Does Not Achieve Rating 0	Did not achieve workload expectations. Did not consistently meet deadlines and commitments. Work consistently contained errors that were within the employee’s control. Did not accept responsibility for actions and decisions. This rating requires documentation of “performance improvement needed” during the last midyear or annual performance appraisal. HR Policy 8.15 applies; see HR Manager for guidance.	

To be completed by supervisor:

Please identify what contributed to the rating above.



SECTION III- FORMATIVE REPORT

To be completed by employee:

List goals you would like to achieve during the next evaluation cycle (include training) that are relevant to your position. Explain expected outcomes and provide action plans and deadlines.

To be completed by supervisor:

Establish standards for job performance and priorities for the coming year. Provide feedback on employee goals to ensure alignment with university values, Ohio State Lima's vision, and unit priorities.

- It is the supervisor's responsibility to maintain records documenting that goals have been reviewed with and understood by the staff member and to ensure that reasonable resources are provided to accomplish them.
- It is the staff member's responsibility to ensure that goals are understood and to seek clarification from his/her supervisor when needed.



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- Staff member and supervisor signatures certify that they have met and discussed the evaluation.
- The employee's signature does not imply agreement or disagreement with the evaluation.
- The employee has the right to attach a statement to this evaluation.
- HR Manager's signature certifies that the evaluation has been reviewed.

Form is due to HR Manager by July 1.

The university expects that supervisor and employee will meet regularly to review progress towards achieving the plans outlined in the Formative Report section of this document. Please schedule these meetings and document them as they occur. The HR Manager will be requesting the documents at the mid-year point.

Employee Signature and Date: _____

Supervisor Signature and Date: _____

Human Resources Manager Signature and Date: _____

Thank you for your commitment to excellence at



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