This appraisal short form is designed to provide performance reviews for part-time employees or when the Workday process isn’t applicable. Documentation should be brief, providing a snapshot of the Employee’s performance during the period listed below. Should overall performance not meet expectations or is rated a “2” or below, a performance improvement plan (PIP) or further evaluation of role is recommended.

|  |
| --- |
| **Employee Profile** |

|  |  |  |  |
| --- | --- | --- | --- |
| **EMPLOYEE** |  | **MANAGER** |  |
| **JOB TITLE** |  | **DIVISION** |  |
| **PERFORMANCE PERIOD** | **From:** |  | **To:** |  |  |  |
| **REVIEW TYPE** | ❒ | Introductory Review | ❒ Annual Review |  |

|  |
| --- |
| **Manager Instructions** |

1. Complete ***Employee Profile***.
2. Review ***Performance Rating Scale*** criteria.
3. Enter Employee ***Goals*** and submit to Employee for self-evaluation (optional for 90-day review).
4. Complete Evaluation, rating Goals, Competencies, Key Strengths/Development Areas, and Recommendation sections of the ***Performance Summary***. Provide details for low/exceptional ratings.
5. Conduct 30-minute review session and share feedback to discuss comments.
6. Sign and date. Provide a copy for yourself and Employee. Send signed copy to HR for filing.

|  |
| --- |
| **Performance Rating Scale** |

Carefully evaluate performance in relation to core ***Staff*** competencies of the job. Assign points for each rating based on the scale below, writing the number that indicates performance rating in the corresponding box. While an employee may rate him/herself, the “Overall Score” is the final rating of the Manager (Evaluator).

|  |  |  |
| --- | --- | --- |
| **Rating** | **Scale** | **Definition** |
| Outstanding | 5 | Consistently exceeds performance objectives and is recognized by peers and/or customers as a leader and positive example for others. Makes significant contributions well beyond normal job responsibilities on a consistent basis. |
| Exceptional | 4 | Consistently meets and occasionally exceeds job performance objectives on a regular basis, making valuable contributions to the company. |
| Satisfactory | 3 | Consistently meets but does not exceed performance objectives. Fully competent and is performing job as expected. |
| Needs Improvement | 2 | Does not adequately accomplish objectives nor fulfill all responsibilities; must improve within a designated period of time. Or, new to position and tasks presently assigned are adequately performed as expected. |
| Unsatisfactory | 1 | Results are unacceptable, well below expectations, and require immediate improvement. Does not accomplish most or all position objectives. |

**NOTE: Comments are required for ratings of “1,” “2” or” 5.”**

|  |
| --- |
| **Performance Summary** (Manager provides final rating) |

Based on assigned performance goals/targets and University ***Individual Contributor*** competencies, please find the overall performance rating, including strengths and development areas:

**EVALUATION: GOALS**

|  |  |  |  |
| --- | --- | --- | --- |
| **Goal** | **Self****Rating** | **Manager****Rating** | **Overall Comments** |
| **GOAL #1: [state performance goal here.]*** [List performance target here.]
* [List performance target here.]
* [List performance target here.]
 |  |  | **EMPLOYEE:**  |
| **MANAGER:** |
| **GOAL #2: [state performance goal here.]*** [List performance target here.]
* [List performance target here.]
* [List performance target here.]
 |  |  | **EMPLOYEE:**  |
| **MANAGER:** |
| **GOAL #3: [state performance goal here.]*** [List performance target here.]
* [List performance target here.]
* [List performance target here.]
 |  |  | **EMPLOYEE:** |
| **MANAGER:** |
| **Overall Rating (average):** | **NA** |  |  |

**EVALUATION: INDIVIDUAL CONTRIBUTOR COMPETENCIES**

|  |  |  |  |
| --- | --- | --- | --- |
| **Competency** | **Self****Rating** | **Manager****Rating** | **Overall Manger Comments** |
| **COMMUNICATION***Articulate thoughts and express ideas effectively using oral, written, visual and non-verbal communication skills, as well as listening skills to gain understanding. Using appropriate methods to facilitate agreement, minimizing damage to the relationship while promoting shared goals.* |  |  |  |
| **CUSTOMER FOCUS & ACCOUNTABILITY***Meeting and exceeding customer needs while cultivating relationships that secure commitment and trust. Promoting and operationalizing best customer service practices as a value.  Following through on commitments taking personal responsibility for decisions, actions, and failures.* |  |  |
| **ADD VALUE***Looks for opportunities to innovate, be a brand advocate, identify cost savings and increased revenue opportunities, streamline processes, invest in high impact practices and enable a high performing culture.* |  |  |
| **GROWTH & DEVELOPMENT***Regularly discusses performance objectives and goals. Awareness of one’s strengths and weaknesses. Identifies areas for continual growth while seeking and applying feedback. Develop plans and goals for your future including personal and professional learning.* |  |  |
| **JOB PERFORMANCE***Consistent, accurate and thorough.  Learns from mistakes.  Meets objectives in a timely manner.  Responsive, prompt and present at work.  Seeks to understand.  Identifies what needs to be done and takes action.  Meets individual, team and organizational related objectives while consistently achieving a high level of quality.* |  |  |
| **Overall Rating (average):** | **NA** |  |  |

**OVERALL COMMENTS**

|  |
| --- |
|  |

|  |
| --- |
| **Signatures** |

The signatures below acknowledge that the performance appraisal review was held with a copy of the final review provided to both Employee and Manager (Evaluator). Furthermore, both parties understand that the original copy of this form will be placed in the Employee’s personnel file.

|  |  |  |
| --- | --- | --- |
|  |  |  |
| Employee Signature |  | Date |
|  |  |  |
| Manager (Evaluator) Signature |  | Date |
|  |  |  |
| Manager’s Manager Signature |  | Date |

cc: Personnel File

Email to HR@marymount.edu to be uploaded on the employee record.