

Performance Evaluation Form Instructions

1. When you open the Evaluation in Adobe Reader, go to the menu and click “File” then “Save As.” Choose where you want to save the form. Save in following format: **Type of Evaluation-Employee Number-Last Name, First Name MI-Date of Evaluation (yyyy-mm-dd format).pdf**.
 - a. Example: Annual Evaluation-0123456-Smith, John A-2011-07-11.pdf
 - i. This will need to be done separately for each employee.
2. Review entire form prior to beginning evaluation process to determine whether employee should be rated in the GENERAL DUTIES (sections 1-5) or both GENERAL and LEADER DUTIES (sections 1-9).
3. Complete all blocks detailing Employee Name, Title, Purpose of Evaluation, etc.
4. Rate employee on each trait from dropdowns and provide comments to support rating where necessary. The Goals and Objectives section is optional.
5. Go to File -> Print to print document for conversation with employee.
6. Employee, Supervisor and Department Head should sign evaluation.
7. Make two copies of the form, one for your records and one for the employee’s records.
8. Completed evaluation should be forwarded to HR Records (AB 254) for placement in the official employee file.

Note: Employee may complete a self-evaluation on the same form; however, it is not mandatory. Employee may also attach a separate document if he/she prefers.

Performance Evaluation Form

Appraisal Period From:

Appraisal Period To:

Date:

Employee Name:

Employee ID Number:

Job Title:

Supervisor Name:

Supervisor ID Number:

Job Title:

Organization:

Date of Hire:

Years in Present Job:

Purpose:

The Performance Evaluation Form is used to objectively measure an employee's job performance. The evaluation is a written record of the employee's job performance and facilitates communication between supervisor and employee. The process should be used to motivate an employee and identify the area(s) of employee strength, those that need improvement and establish job performance, training and development goals for the coming year. A periodic review of the employee's work performance by the supervisor gives everyone a better understanding of the employee's capabilities and contributions to the department and UAB.

Rating Scale:

Failed to Meet Expectations	Significantly below criteria required for successful job performance/behavior
Met Some Expectations	Generally did not meet criteria relative to quality and quantity of job performance/behavior required
Met Expectations	Met criteria relative to quality and quantity of job performance/behavior required
Met All and Exceeded Some Expectations	Generally exceeded criteria relative to quality and quantity of job performance/behavior required
Exceeded Expectations	Significantly above criteria required for successful job performance/behavior

General Duties (1-5)

1. **Job Knowledge, Skills and Judgment:** Demonstrates knowledge of the tasks, procedures, processes, equipment, etc. necessary to effectively perform the job. Recognizes issues, problems, or opportunities and uses logical and sound judgment in determining appropriate course of action. Includes others in the decision making process as needed.

Rating: _____

Comment:

2. **Quality of Work:** Demonstrates accuracy and quality of work in general; ensures thoroughness, neatness, completeness of work. Adheres to the organization's quality standards.

Rating: _____

Comment:

3. **Productivity, Efficiency and Dependability:** Effectively manages one's time and resources to ensure that work is completed efficiently and at expected levels of output. Displays commitment to the job by being available for work, doing it properly and completing it on time without complaint. Promotes teamwork by respecting and encouraging team members. Volunteers to work with others to get the job done.

Rating: _____

Comment:

4. **Communication:** Exhibits effective and appropriate verbal and written communication skills, listening skills. Checks understanding and presents information in a way that enhances understanding.

Rating: _____

Comment:

5. **Other:** Other area of focus for this position that is not reflected above to assist in assessing employee performance.

Rating: _____

Comment:

This section is to be completed for management-level positions only.

Leader Duties (6-9)

6. **Decision-making:** Identifies and understands issues, problems, and opportunities. Uses logical and sound judgment to make optimal decisions in a timely manner.

Rating: _____

Comment:

7. **Planning and Organization:** Sets and/or executes the appropriate goals/vision for the department. Facilitates the implementation and acceptance of change. Analyzes work, develops plans of action, clearing obstacles or situations as needed, and demonstrates good utilization of time. Understands the functions of the jobs within the department. Ensures that employees have tools and resources to effectively carry out the expectations of the job(s). Manages continuous improvement and quality processes.

Rating: _____

Comment:

8. **Personnel Management:** Effectively and efficiently manages staff for assigned areas to ensure commitment to diversity, adequate staffing, communication, training, evaluation, and discipline as needed. Creates a motivating climate, achieves teamwork. Develops talent, skills and competencies of staff. Empowers individuals and team, measures work in progress, solicits ideas from employees. Delegates according to the individual's skill, knowledge, and abilities. Provides timely feedback to staff (positive and corrective) as needed and/or required.

Rating: _____

Comment:

9. **Fiscal Management:** Identifies and understands issues, problems, and opportunities. Uses logical and sound judgment to make optimal decisions in a timely manner.

Rating: _____

Comment:

Goals and Objectives (optional)

Previous Year: Specify any goals and objectives attributed to the job from the previous year.

Comment:

Upcoming Year: Specify any goals and objectives attributed to the job for the upcoming year.

Comment:

Overall Rating

Rating: _____

Comment:

Your signature below does not necessarily signify your agreement with the appraisal; it simply means that the appraisal has been discussed with you.

Employee Signature

Date

Supervisor Signature

Date

Department Head Signature

Date