

Performance Review Form FY

Employee Name:

Date:

Review Type:

Annual

Job Title:

Department:

90-Day

Supervisor Name :

Division:

6-Month

Performance evaluation is the process of assessing, summarizing and planning for development of employee performance. Developing employee performance furthers the mission of the organization and enhances the overall quality of the workforce within Loyola University New Orleans in multiple ways. This process promotes a climate of continuous learning and professional growth, helping to sustain employee performance at a level which meets or exceeds expectations. We want to enhance job- or career-related skills, knowledge and experience; enabling employees to keep abreast of changes in their fields; making employees competitive for employment opportunities within the University, promoting diversity & inclusion objectives, and motivating employees.

Goals & Key Responsibilities

This section provides supervisors with the ability to rate and comment on current year performance goals and/or key job responsibilities. Documentation and evaluation resource

All five goals & key responsibilities must be rated in order for this section to provide an accurate score.

1 Not Meeting Expectations	2 Needs Some Improvement	3 Fully Meets Expectations	4 Fully Meets & Often Exceeds Expectations	5 Consistently Exceeds Expectations
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Score: _____ 1.

Score: _____ 2.

Score: _____ 3.

Score: _____ 4.

Score: _____ 5.

Average Score: _____

Core Competencies

The core competencies section of the review allows for both quantitative and qualitative feedback on performance for employees. Supporting comments and examples help employees understand better the expectations of their performance. A score of less than 3 requires specific comments and examples.

1
Not Meeting
Expectations

2
Needs Some
Improvement

3
Fully Meets
Expectations

4
Fully Meets & Often
Exceeds Expectations

5
Consistently Exceeds
Expectations

Personal Accountability - Ratings Scale

Commitment to Quality – Takes pride in work, strives for excellence. Takes responsibility for performance and fixes mistakes. Continually looks to improve the quality/quantity of work. Maintains a consistent level of performance, even when conditions of stress prevail.

Safety Consciousness – Contributes to a safe working environment; performs duties in a clean and safe manner. Brings safety concerns to appropriate parties; takes initiative to resolve when possible. Keeps workplace neat, clean and organized.

Attendance and Punctuality – Fulfills work and time requirements. Keeps unscheduled absences to a minimum. Plans for coverage of responsibilities, where appropriate.

Reliability/Dependability – Meets task deadlines and work commitments. Fulfills work obligations in a timely and satisfactory manner. Establishes and implements appropriate priorities. Takes responsibility for personal actions and related outcomes. Follows through on commitments.

Score: _____

Supporting Comments and Examples:

Professionalism - Ratings Scale

Self Awareness – Demonstrates continuous professionalism, respect, and workplace civility. Mindful of actions, topic, tone, volume, and body language. Avoids gossip.

Working with Others – Approachable, inclusive, and respectful. Exhibits teamwork, takes initiative to help. Courteous and cooperative. Respects diversity and appreciates differences.

Relationship to Supervisor – Responds and acts cooperatively; works to maintain positive relationships with supervisor/manager. Accepts responsibility for own actions.

Gives and Receives Feedback – Provides constructive feedback to colleagues. Mindful of both verbal and body language when giving feedback. Receptive to feedback from others; accepts feedback without defensiveness.

Role Modeling – Upholds professional and ethical standards. Demonstrates departmental and organizational values including Honesty, Trust, Respect, Critical Thinking, Commitment to Excellence, and Cura Personalis.

Score: _____

Supporting Comments and Examples:

Core Competencies

1 Not Meeting Expectations	2 Needs Some Improvement	3 Fully Meets Expectations	4 Fully Meets & Often Exceeds Expectations	5 Consistently Exceeds Expectations
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Functional Expertise - Ratings Scale

Job Knowledge – Clearly demonstrates functional expertise as it relates to the job. Strives for excellence. Asks relevant questions when uncertain. Shares information and knowledge with others. Keeps abreast of new developments and enhancements to systems, procedures and products. Values learning; seeks out new learning and development opportunities.

Problem Solving & Decision Making – Considers the effect of decisions on other areas of the department and/or the University. Makes appropriate decisions in a timely manner. Delegates tasks and projects appropriately. Exhibits sound professional judgment, even in the absence of policy, to deliver timely results in a manner that is consistent with organizational values.

Policy Awareness – Understands and adheres to departmental and organizational standards, policies and processes as appropriate. Seeks guidance when uncertain. Continuously works to maintain standards.

Use of Resources – Works to reduce waste by identifying ways to be more efficient with time, money, or processes. Where appropriate is aware of equipment and supply costs; understands appropriate use of resources. Demonstrates a sense of organizational stewardship.

Score: _____

Supporting Comments and Examples:

Service Excellence - Ratings Scale

Treatment Towards Others – Listens carefully, expresses compassion and empathy where appropriate. Mindful of the perspective and needs of others (e.g. colleagues, patients, students, families and others).

Service Orientation – Promotes a student-centered campus culture and reinforces teamwork within the University. Understands and supports Loyola's mission and values. Ensures that commitments to internal and external customers are met.

Communication – Communicates ideas and messages clearly and concisely. Actively listens, seeks to understand others. Communicates effectively in interactions and cooperates with others. Keeps others informed of progress and challenges. Benefits from feedback.

Productivity – Works to deliver an expected volume of work; Makes contributions to improve current methods and systems without sacrificing quality. Works to stay organized. Uses technology as needed/where appropriate.

Responds to Change – Adapts to changing priorities. Handles unexpected situations and does so in a calm and positive manner. Where appropriate, questions and recommends alternatives to new processes and procedures.

Score: _____

Supporting Comments and Examples:

Updated Performance Goal Planning

The purpose of this section is to update and/or create new performance goals and continuing key responsibilities for the next review cycle. These updated key responsibilities and performance goals will be rated during the next annual performance review cycle. Ongoing key responsibilities and performance goals should be included in this section. SMART Goal Planning Resource.

Goal #1

Goal #2

Goal #3

Goal #4

Goal #5

Summary Section

Section	Section Weight	Section Score	Weighted Score
Goals & Key Responsibilities	50%		
Core Competencies	50%		

Overall Performance Review Score

0.0 – 1.4
Not Meeting
Expectations

1.5 – 2.4
Needs Some
Improvement

2.5 – 3.4
Fully Meets
Expectations

3.5 – 4.4
Fully Meets and Often
Exceeds Expectations

4.5 – 5.0
Consistently
Exceeds Expectations

Performance Review Comments – Manager Writing Review:

Performance Review Comments – Employee Being Reviewed:

Development Action Plan - _____ year

Development action plans should be developed in collaboration by the supervisor and the employee. Action plans should be specific and results oriented with measurable outcomes designed to be achieved within a designated time period. The supervisor and employee should agree to appropriate follow up date(s) for specific goals, which will provide the opportunity to refine and clarify goals. This “action plan” is intended to initiate and supplement performance goal setting and performance communication that is on-going in your area of work. During subsequent communications, the supervisor is responsible for finalizing, modifying, and prioritizing the goals and development plans for the year.

Professional Development Goals: Establish a plan to acquire the knowledge, skills, and abilities needed for the employee to improve in their current position. This should include specific activities, projects or strategies which address performance gaps, continual professional growth & learning, and relevant career aspirations. Identify target completion dates for long and short term goals and appropriate follow up date(s) to monitor progress or refine goals.

Developmental Goals:	Target Date	Follow Up Date

Future Projects & Objectives: Briefly describe each goal or project by stating who, what, when and the parameters of work assigned (hours, costs, etc.) These should be targeted goals and projects to develop employee knowledge, skills, and abilities with practical experience in the workplace. Identify target completion dates for long and short term goals appropriate follow up date(s) to monitor progress or refine goals. This short list should be refined, updated and added to as University, School or division and departmental planning and goals change.

Projects & Objectives:	Target Date	Follow Up Date

- Supervisor copy saved/printed
- Employee copy emailed/provided to employee
- Updated Job Description provided to Human Resources, if applicable

Employee’s Signature (indicating review & discussion of document) Date

Supervisor’s Signature Date

Human Resources Reviewer Signature Date