

The University of Oklahoma Staff Performance Evaluation Summary Report



Complete **all sections** of this form after conducting the evaluation. Send the original to your campus Office of Human Resources (see addresses below) along with any documentation provided by the employee. One copy should be retained for the department's records and one copy should be provided to the employee. Do not forward the performance evaluation documentation or the evaluator's notes to human resources. That information should be kept on file with the evaluator's department.

Employee's Name:		EMPL ID:
Job Title:		
Position Number:	Date of Evaluation (MM/DD/YY):	
Budget Account Title:		Account Number:
Evaluation Period (MM/DD/YY)	From:	To:

University compliance requirements. Please respond to all four questions:

- Has the employee complied with the University's Standards of Conduct? YES NO N/A
- Has the employee complied with the University's Privacy Policies and Procedures? YES NO N/A
- Has the employee completed the University's Annual Safety Training Courses? YES NO N/A
- Has the employee completed the Harassment & Discrimination Awareness Training? YES NO N/A

Use the following categories to provide a general assessment of the employee's work performance. Check one:

- Unsatisfactory work performance.
- Work performance needs improvement. Employee is having performance problems.
- Work performance meets normal work requirements. The employee completes tasks as assigned.
- Employee performs beyond normal work requirements.

The evaluator should provide a written explanation of the general assessment of the employee's work performance in the comments section below.

<p>Evaluator's Summary Comments:</p>

A signature here indicates that a performance evaluation has been completed by the evaluator(s) and a copy of that evaluation has been given to the employee.



Evaluator(s) Signature(s)	Date
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Employee's Summary Comments: (Attach any additional documentation and information within five working days from the date of the performance evaluation session.)

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A signature here indicates that an evaluation regarding performance has been completed and discussed with the employee. It does not indicate that the employee necessarily agrees with its content.



Employee Signature Here	Date
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Budget Unit Head Signature Here (If Applicable)	Date
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Norman Campus - Office of Human Resources - 905 Asp Ave., NEL 244, Norman, OK, 73019
OKC Campus - Office of Human Resources - SCB 120F - OKC, OK, 73104
Tulsa Campus - Office of Human Resources - 4502 E. 41st. Street, Suite 1C114 - Tulsa, OK, 74135

THE UNIVERSITY OF OKLAHOMA HSC - OKC

STAFF PERFORMANCE EVALUATION FORM

Employee Name _____ Date: _____

Title _____ Pay Grade _____ Evaluation Period: From: _____ To: _____

Annual Probationary

Department _____ Dept. # _____ Days Absent in Period: _____

	Unsatisfactory Work Performance	Performance Needs Improvement	Meets Normal Work Requirements	Works Beyond Normal Work Requirements
1. QUALITY AND QUANTITY OF WORK				
Accuracy	<input type="checkbox"/> Makes significant errors in work assignments.	<input type="checkbox"/> Errors common; work must be checked.	<input type="checkbox"/> Work usually error-free.	<input type="checkbox"/> Consistently error-free; Very few errors made.
Neatness	<input type="checkbox"/> Work is often sloppy or haphazard.	<input type="checkbox"/> Neatness of work is below average. Careless.	<input type="checkbox"/> Work is usually neat.	<input type="checkbox"/> Work is very neat and polished.
Thoroughness & Timeliness	<input type="checkbox"/> Often work is not completed in timely manner. Offers incomplete work.	<input type="checkbox"/> Sometimes deadlines not met; may be incomplete or not well developed.	<input type="checkbox"/> Deadlines and expectations usually met.	<input type="checkbox"/> Exact and precise. Deadlines observed.
Volume	<input type="checkbox"/> Does not produce at adequate level.	<input type="checkbox"/> Often produces below expectation.	<input type="checkbox"/> Meets average production requirements.	<input type="checkbox"/> Exceeds average requirements. Industrious.

STRENGTHS:

WEAKNESSES:

2. JOB KNOWLEDGE				
Skills	<input type="checkbox"/> Poorly equipped to perform many aspects of job.	<input type="checkbox"/> Lacks ability or understanding of some areas of job.	<input type="checkbox"/> Generally knowledgeable about the job.	<input type="checkbox"/> Understands all aspects of job.
Training	<input type="checkbox"/> Does not respond well to training either by supervisor or peer.	<input type="checkbox"/> Often slow or somewhat unwilling to respond to training.	<input type="checkbox"/> Generally responds well to training.	<input type="checkbox"/> Responds to training with enthusiasm. Quick learner; appreciates learning new things.
Oral/Written Communication	<input type="checkbox"/> Not able to communicate well verbally and/or in written form.	<input type="checkbox"/> Communication skills are lacking but usually able to get message across.	<input type="checkbox"/> Able to communicate verbally and/or in writing.	<input type="checkbox"/> Well-developed written and verbal communication skills.
Decision-Making	<input type="checkbox"/> Not capable of making effective job-related decisions.	<input type="checkbox"/> Often unable to make effective decisions.	<input type="checkbox"/> Can usually make good work-related decisions.	<input type="checkbox"/> Able to make effective and timely work-related decisions.

STRENGTHS:

WEAKNESSES:

	Unsatisfactory Work Performance	Performance Needs Improvement	Meets Normal Work Requirements	Works Beyond Normal Work Requirements
3. INITIATIVE				
Goal Setting/ Planning	<input type="checkbox"/> Unable to plan or prioritize work. Puts forth little effort.	<input type="checkbox"/> Often plans work poorly or makes bad priority choices. May set low goals.	<input type="checkbox"/> Usually plans work well, may occasionally err in choice of work performed.	<input type="checkbox"/> Prioritizes and plans work well. Has desire to achieve.
Organization of Work	<input type="checkbox"/> Unable or unwilling to work in an organized manner or environment.	<input type="checkbox"/> Occasionally attempts to organize work. Marginal organizational skills.	<input type="checkbox"/> Usually well organized.	<input type="checkbox"/> High degree of organizational skills.
Creativity	<input type="checkbox"/> Cannot or does not suggest new ideas.	<input type="checkbox"/> Rarely offers new ideas or concepts.	<input type="checkbox"/> Sometimes presents new ideas or better ways of doing things.	<input type="checkbox"/> Often has new idea or may suggest ways to streamline. Does original work.
Resourcefulness	<input type="checkbox"/> Unable to solve problems or locate answers to questions.	<input type="checkbox"/> Regularly needs assistance from supervisor or coworkers to locate information or to solve a problem.	<input type="checkbox"/> Shows some resourcefulness in problem solving but may need some assistance.	<input type="checkbox"/> Normally is able to locate needed information. Good problem-solving skills.
Adaptability/ Versatility	<input type="checkbox"/> Unwilling to change job duties or departmental procedures. Inflexible.	<input type="checkbox"/> Objects to or resists changes in job duties or procedures. Adjusts with difficulty.	<input type="checkbox"/> Accepts changes in job duties or departmental procedures.	<input type="checkbox"/> Accepts changes well. Adaptable.

STRENGTHS:

WEAKNESSES:

4. ATTITUDE/ COOPERATION				
General Attitude	<input type="checkbox"/> Poor Attitude. Unwilling to accept constructive criticism.	<input type="checkbox"/> Attitude sometimes poor. Tendency to respond poorly to criticism.	<input type="checkbox"/> Generally displays good attitude. Able to respond to criticism.	<input type="checkbox"/> Consistently displays positive attitude. Accepts and responds to constructive criticism.
Interest in Job	<input type="checkbox"/> Shows lack of interest in performing or improving.	<input type="checkbox"/> Tries occasionally to improve performance.	<input type="checkbox"/> Shows interest in performance and job.	<input type="checkbox"/> Works to improve self, gain knowledge and work more effectively.
Ability to Work Under Pressure	<input type="checkbox"/> Unable to work under pressure or deal with stressful situations.	<input type="checkbox"/> Has difficulty dealing with job pressure and stress.	<input type="checkbox"/> Usually able to cope with stressful situations.	<input type="checkbox"/> Handles pressure and stressful situations without difficulty.
Interaction with Co-Workers (Within Dept.)	<input type="checkbox"/> Does not work well with co-workers. Poor interaction skills.	<input type="checkbox"/> Sometimes has problems working with co-workers.	<input type="checkbox"/> Works well with co-workers.	<input type="checkbox"/> Effectively deals with co-workers on a regular basis. Develops good relationships.
Interaction with Co-Workers (Other Depts.)	<input type="checkbox"/> Does not work well with co-workers. Poor interaction skills.	<input type="checkbox"/> Sometimes has problems working with co-workers.	<input type="checkbox"/> Works well with co-workers.	<input type="checkbox"/> Effectively deals with co-workers on a regular basis. Develops good relationships.
Interaction with Public (patients, visitors, residents, etc.)	<input type="checkbox"/> Rarely offers assistance. Often shows lack of consideration.	<input type="checkbox"/> Treats public with minimal courtesy.	<input type="checkbox"/> Normally courteous, considerate and helpful.	<input type="checkbox"/> Treats public well. Very helpful, offers assistance, anticipates needs.

	Unsatisfactory Work Performance	Performance Needs Improvement	Meets Normal Work Requirements	Works Beyond Normal Work Requirements
4. ATTITUDE/OPERATION (cont.) Interaction with Supervisor	<input type="checkbox"/> Avoids contact or displays inappropriate behavior. Confrontational; shows anger, hostility or disinterest.	<input type="checkbox"/> May deal poorly with supervisor or display inappropriate or problem behavior sometimes.	<input type="checkbox"/> Contact generally appropriate. Rarely exhibits problem behavior.	<input type="checkbox"/> Contact with supervisor positive. Good interaction. Cheerful, cooperative.

STRENGTHS:

WEAKNESSES:

5. RELIABILITY Attendance	<input type="checkbox"/> Absent often.	<input type="checkbox"/> Misses days fairly often. Use tends to exceed departmental standards.	<input type="checkbox"/> Amount of time absent is in accordance with departmental expectations.	<input type="checkbox"/> Rarely absent. Uses fewer days than departmental expectations.
Notification of Absences	<input type="checkbox"/> Often doesn't notify department or supervisor of absences.	<input type="checkbox"/> Doesn't always notify department timely or does not contact proper person.	<input type="checkbox"/> Usually notifies department or supervisor in timely fashion.	<input type="checkbox"/> Notifies department in timely manner. May discuss or review work assignments.
Punctuality	<input type="checkbox"/> Regularly late. Rarely has valid excuse.	<input type="checkbox"/> Late often, usually without valid excuse. May use variety of excuses.	<input type="checkbox"/> Occasionally late; would normally have valid excuse.	<input type="checkbox"/> Prompt. May be late on very rare occasions.
Use of Work Time	<input type="checkbox"/> Makes poor use of work day. Wastes considerable time; away from work station regularly; disappears.	<input type="checkbox"/> Does not make good use of working day. Tends to waste time. May be away from work station often.	<input type="checkbox"/> Works according to departmental expectations. Takes appropriate time away from work station.	<input type="checkbox"/> Makes good use of working hours. Does not waste time. Efficient.
Follows orders/ Procedures	<input type="checkbox"/> Unable or unwilling to follow procedures/orders. Often does not comply. Complains.	<input type="checkbox"/> Often unwilling to follow orders, May complain or express displeasure.	<input type="checkbox"/> Able to follow orders and/or procedures.	<input type="checkbox"/> Willingly follows orders and changes in procedure.
Confidentiality	<input type="checkbox"/> Proven unable to respect confidential information.	<input type="checkbox"/> Often cannot be trusted to maintain confidentiality.	<input type="checkbox"/> Can normally be trusted with routine and/or confidential information.	<input type="checkbox"/> Trustworthy with confidential information.

STRENGTHS:

WEAKNESSES:

6. PERSONAL APPEARANCE	<input type="checkbox"/> Poor grooming habits. Usually inappropriately attired.	<input type="checkbox"/> Sometimes untidy and careless. May be inappropriately attired occasionally.	<input type="checkbox"/> Usually good. Clean, tidy, appropriate.	<input type="checkbox"/> Careful about appearance. Well groomed.
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STRENGTHS:

WEAKNESSES:

	Unsatisfactory Work Performance	Performance Needs Improvement	Meets Normal Work Requirements	Works Beyond Normal Work Requirements
7. HEALTH AND SAFETY Life Work Practices	<input type="checkbox"/> Ignores or refuses to utilize recognized, established safe work practices and procedures; does not perform duties in safe and healthful manner.	<input type="checkbox"/> Utilizes safe work practices and procedures only when convenient or supervised. Often performs duties in unsafe or unhealthful manner.	<input type="checkbox"/> Routinely performs job utilizing safe work practices and procedures. Uses common sense to perform duties in safe manner.	<input type="checkbox"/> Makes health and safety issues a priority. Reacts to and avoids unsafe or injurious situations.

STRENGTHS:

WEAKNESSES:

8. SUPERVISION (To be completed for supervisory personnel only.)				
Motivation	<input type="checkbox"/> Makes no attempt to motivate employees.	<input type="checkbox"/> Rarely tries to motivate employees.	<input type="checkbox"/> Makes an effort to keep employees motivated.	<input type="checkbox"/> Puts forth considerable effort to motivate employees. Effective.
Training - Work Procedures	<input type="checkbox"/> Poor training skills or does not make training opportunities available.	<input type="checkbox"/> Minimal training skills. Trains only as required. In/outside training not encouraged.	<input type="checkbox"/> Capable trainer and/or makes some training opportunities available.	<input type="checkbox"/> Good trainer. Keeps employees aware of changes & offers in/outside work-related training.
Training - Hazard Communication/ Safety	<input type="checkbox"/> Has not received mandatory training. Does not provide same to employees.	<input type="checkbox"/> Allows training only when pressured to do so.	<input type="checkbox"/> Capable trainer and/or makes some training opportunities available.	<input type="checkbox"/> Good trainer. Attends and provides training in-house or enrolls employees in outside training. Keeps up with new requirements.
Delegation	<input type="checkbox"/> Cannot delegate to appropriate subordinates.	<input type="checkbox"/> Sometimes delegates but may feel compelled to do most of the work.	<input type="checkbox"/> Usually delegates work as appropriate.	<input type="checkbox"/> Effectively delegates work to subordinates. Gives credit as appropriate.
Conflict Resolution	<input type="checkbox"/> Allows employees to deal with conflicts. Makes no effort to assist.	<input type="checkbox"/> Sometimes assists in resolving conflicts but not particularly effective.	<input type="checkbox"/> Usually effective in resolving conflicts.	<input type="checkbox"/> Skilled in conflict resolution.
Objectivity	<input type="checkbox"/> Uses poor judgment in interaction with subordinates. Does not treat all in like manner.	<input type="checkbox"/> Some inconsistent behavior. Often unable to remain objective.	<input type="checkbox"/> Fairly objective. Usually shows good judgment in interaction with subordinates.	<input type="checkbox"/> Treats employees objectively. Fair. Shows no favoritism. Interacts well.

STRENGTHS:

WEAKNESSES:

9. RECOMMENDATIONS FOR IMPROVED JOB PERFORMANCE:

EMPLOYEE COMMENTS:

OVERALL EVALUATION:

Unsatisfactory Work Performance	Performance Needs Improvement	Meets Normal Work Requirements	Works Beyond Normal Work Requirements
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_____ x 0 Points= 0 _____ x 1 Point = _____ _____ x 2 Points = _____ _____ x 3 Points = _____

TOTAL NUMBER OF POINTS: _____ OVERALL PERFORMANCE: (See scoring tool below) _____

Date of Review: _____

Signatures: Employee: _____

cc: Department Head

Supervisor: _____

OVERALL PERFORMANCE SCORING*

NON-SUPERVISORY PERSONNEL

<u>Number of Points:</u>	<u>Performance Assessment Category</u>
0 - 21	1. Unsatisfactory work performance.
22 - 43	2. Work performance needs improvement. Employee is having performance problems.
44 - 65	3. Work performance meets normal work requirements. The employee completes tasks as assigned.
66 - 84	4. Employee performs beyond normal work requirements.

SUPERVISORY PERSONNEL

<u>Number of Points:</u>	<u>Performance Assessment Category</u>
0 - 24	1. Unsatisfactory work performance.
25 - 50	2. Work performance needs improvement. Employee is having performance problems.
52 - 76	3. Work performance meets normal work requirements. The employee completes tasks as assigned.
77 - 102	4. Employee performs beyond normal work requirements.

**Scores tie employee performance to the four performance categories on the University of Oklahoma Staff Performance Evaluation Summary Report.*

Complete the University of Oklahoma Staff Performance Evaluation Summary Report now.

9. RECOMMENDATIONS FOR IMPROVED JOB PERFORMANCE:

EMPLOYEE COMMENTS:

OVERALL EVALUATION:

Unsatisfactory Work Performance	Performance Needs Improvement	Meets Normal Work Requirements	Works Beyond Normal Work Requirements
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x 0 Points = x 1 Point = x 2 Points = x 3 Points =

TOTAL NUMBER OF POINTS:
OVERALL PERFORMANCE:

Date of Review: _____

Signatures: Employee: _____

cc: Department Head

Supervisor: _____

OVERALL PERFORMANCE SCORING*

NON-SUPERVISORY PERSONNEL

Number of Points: Performance Assessment Category

- 0 - 21 1. Unsatisfactory work performance.
- 22- 43 2. Work performance needs improvement. Employee is having performance problems.
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- 66 - 84 4. Employee performs beyond normal work requirements.

SUPERVISORY PERSONNEL

Number of Points: Performance Assessment Category

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- 52 - 76 3. Work performance meets normal work requirements. The employee completes tasks as assigned.
- 77 - 102 4. Employee performs beyond normal work requirements.

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prepared by: Office of Human Resources - Tuk OKC*