



Full-Time Performance Evaluation Instructions & Guidelines

Purpose of the Evaluation

The performance evaluation should be a fair and balanced assessment of an employee's performance. It is a time for the supervisor to review the employee's performance of the last year, give and receive feedback, clarify job duties, explain management's expectations and set goals for the coming year.

Essential Elements of the Performance Evaluation

- Supervisor reviews the employee's job duties to be evaluated as outlined in the employee's job description.
- Supervisor should consider material provided via the 360 feedback process (where applicable) and/or via direct and indirect feedback from staff within the department and the organization.
- Supervisor should also review the performance review from the previous year to see if the employee's goals and objectives were met.

Timeline

- Evaluations shall be completed upon the employee's completion of the employee's six-month introductory period and then annually thereafter.
- For annual evaluations, evaluations are given to employees in August and should reflect the performance from July 1 of the previous fiscal year through June 30 of the current fiscal year.
- Completed evaluation, including employee response, should be completed by the beginning of August and forwarded to the Human Resources department for retention.
- Management Group 360 feedback surveys occur each April in order to be utilized as part of the overall evaluation process.

Evaluation Template

There are two Employee Performance Evaluation form templates – one for Hourly Employees and one for Salaried Employees. Depending on the employee type, the Employee Performance Evaluation form outlines review criteria and expectations for each. Both evaluation forms are comprised of five sections.

1. **Section A** – Supervisors will rate employees based on the "Performance Evaluation Ratings" (see below) in each category and provide feedback and examples in the "Comments" section. When a factor is not considered applicable to the employee's role/position, the category may be recorded as Not Applicable (N/A).
2. **Section B** – Supervisors will record progress achieved by the employee in attaining previously set goals, while also highlighting any special achievements and accomplishments by the employee.
3. **Section C** – Supervisors will rate and record the overall performance of the employee. This should take into account all factors and total performance over the period being evaluated. The Overall section should not be viewed as an average of all areas rated.

4. **Section D** – Supervisors will record agreed-upon and/or prescribed goals for the next evaluation period. Goals can be either performance-based goals or project-based goals.
5. **Section E** – This section provides the employee with an opportunity to comment on the evaluation. Should more space be required, a separate document can be attached.

Performance Ratings

The following guidelines are illustrative, but not exhaustive, concerning the standards of performance expected for each rating level on the overall rating on the Employee Performance Evaluation forms. These guidelines are not meant to be rigid criteria, but are offered to assist supervisors in understanding and applying the performance ratings.

Rating Definition	Illustrative Examples (including, but not limited to)
<p>EXCEEDS EXPECTATIONS</p> <p>Reserved for employees who provide an exceptional level of performance or service and who regularly and substantially exceed overall expectations. Outstanding performers work with little or no supervision and generate output that is exceptionally high in quality, quantity, and timeliness. The individual assumes a very high level of responsibility for his or her own performance, contributes to the articulation and definition of new programs or services, and stands as a model for other staff. Employees rated at this level have typically achieved extraordinary results that have readily demonstrable benefits to the Associated Students of SDSU. Also, these employees demonstrate most of the characteristics described in the illustrative examples. Outcomes are of such quality that they occur among only a small number of employees.</p>	<ul style="list-style-type: none"> • Routinely volunteers for extra work/responsibility while maintaining strong job performance • Recognizes the need for change and often suggests new policies, procedures, techniques as a need emerges • Maintains a positive and professional manner even when under pressure; welcomes constructive criticism • Effectively manages multiple priorities, tasks, and/or requests • Helps facilitate change in a positive manner • Readily assumes responsibility • Demonstrates an exceptional commitment to service, thus representing A.S. in a manner that reflects well on the organization internally and externally • Communicates clearly; fosters communication in every direction by actively engaging in the exchange of information and encouraging this activity in supervised staff • Recognized for exceptional expertise and leadership
<p>MEETS EXPECTATIONS</p> <p>Employees rated at this level regularly meet and occasionally exceed expectations. A rating at this level indicates that the employee is a competent, productive and valued member of the team. A fully successful employee consistently meets expectations within specified time and cost limits, understands and supports A.S. goals and priorities, contributes innovative and creative approaches to meeting and furthering achievement of the organization's mission.</p>	<ul style="list-style-type: none"> • Produces the quality of work to meet and occasionally exceed job expectations • Applies logic and reason successfully when making decisions; makes infrequent errors due to oversight and/or misunderstanding • Applies appropriate judgment in responding to and referring questions or resolving problems • Willingly implements new techniques, considering the concerns and suggestions of others • Accepts constructive criticism

<p>Employees rated at this level demonstrate most of the characteristics described in the illustrative examples.</p>	<ul style="list-style-type: none"> • Handles suggestions to problems reasonably and within an appropriate time frame • Is a good listener; provides appropriate information to others; assists others with projects when asked • Minimizes downtime; continuously tries to improve work performance • Maintains up-to-date knowledge of relevant procedures and functions • Readily accepts a change once the team decides to move in a direction • Promotes/supports department, colleagues, supervisors, administration, the University, and A.S. in action and in words • Adheres to time and attendance rules
<p>NEEDS IMPROVEMENT</p> <p>Employees who do not regularly meet overall expectations or who regularly meet or exceed job performance expectations in some areas, but do not regularly meet expectations in other performance areas. The employee has demonstrated some willingness or ability to improve performance and resolve deficiencies that are less than satisfactory and which require that steps be taken to improve performance. Employees in this category need improvement to reach the fully successful level. When performance is at this level, corrective action and/or additional training may be necessary.</p>	<ul style="list-style-type: none"> • Performs in an unreliable or inconsistent manner when completing work; fails to complete tasks without frequent reminders; often exceeds the expected time frame to complete assigned tasks • Is not proactive in completing assignments; often looks for reasons why assignments cannot be accomplished • Requires considerable supervisory monitoring, consultation and modification to implement goals and priorities in a timely and/or effective manner • Fails to anticipate and/or respond effectively to problems, obstacles and/or changes in program direction • Does not make meaningful contributions to solving problems • Rejects new ideas without due consideration • Talks and/or behaves abrasively and/or offensively; exhibits discourteous or disruptive behavior • Fails to adhere to time and attendance rules
<p>UNACCEPTABLE</p> <p>Employees at this level clearly and consistently fail to meet all or most significant job expectations. The employee shows either unwillingness or an inability to improve. When performance is at this level, disciplinary action may be necessary.</p>	<ul style="list-style-type: none"> • Requires substantial supervisory monitoring, consultation and modification to implement goals and priorities in a timely and/or effective manner • Habitually negligent in carrying out responsibilities • Purposefully insubordinate • Purposefully wastes materials; damages resources, equipment or property • Unwilling or unable to respond to problems, obstacles, and/or changes in program direction

	<ul style="list-style-type: none"> • Often fails to recognize and identify routine problems • Habitually absent, tardy, or uses time inefficiently; knowingly fails to report an absence
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Tips for Writing the Evaluation

- Avoid generalizing. Cite specific examples and provide specific goals
- Supervisor should consider the employee's entire year's performance, not just recent occurrences or actions/behaviors
- Describe behaviors and the business impact
- Solicit feedback from the employee regarding what the individual feels are major accomplishments from the past year and goals for the next year
- Highlight 3-5 accomplishments of the past year – training, projects, performance measures
- Recognize mission-based impacts and how the employee adjusted to changes in the department
- Describe areas where the employee needs to adjust or improve
- Refer to both
 - the job description (technical, what the employee does)
 - and the core competencies (behavioral, how they do it)
- Set goals for the coming year. Goals can be either Performance-based Goals or Project-based Goals
 - Performance-based Goals work toward improving the performance factors that require additional focus/attention in order to successfully perform the expectations of the position.
 - Project-based Goals are assignments/tasks that need to be accomplished in the coming year specific to the employee's current role.
- Goals should be specific to the employee and the employee's job duties, measurable (tangible evidence of completion) and attainable (should stretch the employee to feel challenged but achievable)