



# Confidential Employee Evaluation Form

**Employee Name:**

**Banner ID#:**

**Classification Title:**

**Department:**

**Evaluation Period:** ☐ 2 Month Probationary ☐ 5 Month Probationary ☐ Annual - from \_\_\_\_ to \_\_\_\_  
☐ Biennial\*- from \_\_\_\_ to \_\_\_\_

\* The period covered by biennial evaluation is not to exceed a two-year period. Probationary evaluations for newly hired and promoted Confidential employees are to be issued immediately after completion of the second month and the fifth month. The probationary period ends six months from the appointment date unless otherwise extended.

## Section 1: Instructions to Evaluators

### Purpose

Timely and effective performance evaluations acknowledge employees' value to the College and provide a framework for positive discussion with employees regarding their contributions to the College, professional development, and recognition of specific contributions to accomplishing the College's mission and goals. Timely and effective performance evaluations ensure that employees and managers engage in regular conversations regarding the job performance and provide opportunities for encouraging improvement. Regular performance evaluation of all employees provides the institution with the opportunity to ensure the effectiveness of its human resources in alignment with accreditation standards. Successful performance management is an ongoing and continuous process involving interactive and open communication between the evaluator and the employee whose performance is being evaluated. The performance management process continues throughout the year with regular communication and feedback between the evaluator and employee. Doing so encourages a higher level of performance and ensures compliance with Administrative Procedure 7364, accreditation standards, and campus practices concerning the preparation and delivery of written performance evaluations at regular intervals.

### Completing the Form

Please consult with Human Resources regarding any questions prior to completing the form. The performance evaluations reflect the evaluator's assessment of the employee's performance of duties and responsibilities with the accomplishment of goals that are consistent with the scope of work described within the employee's assigned job classification description. The evaluation must be developed by the employee's immediate manager (a non-Confidential employee).

Evaluations are conducted every two years for permanent employees if the overall rating of the evaluation is Meets and Regularly Exceeds Expectations (XE) or Meets Expectations (ME). The evaluation period for non-probationary employees is the preceding two-year period, beginning at the time of appointment. The employee's first year evaluation will cover the first six months of the probationary period as well as the six-month period following the end of the probationary period. Probationary evaluations are conducted and issued immediately after the completion of the second month and the fifth month of the six-month probationary period. The fifth-month evaluation may reference any improvement or other issues identified in the prior probationary evaluation. The objective of the fifth month evaluation is to provide an opportunity for assessment before the probationary period ends. Please contact Human Resources immediately if there are any concerns regarding the performance of a probationary employee.

### **Performance Evaluation Meeting**

Employees will be given no less than two (2) working days of notice prior to any scheduled evaluation meeting with the evaluator, unless mutually agreed upon between the Confidential employee and the evaluator. Employees will be provided with a copy of their completed evaluation a minimum of two (2) working days prior to the evaluation meeting. This provides the employee an opportunity to review the evaluation and identify any areas of concern, which may then be discussed with the evaluator during the performance evaluation meeting.

### **Assigning Ratings for Performance Elements**

The evaluation ratings for the individual Performance Elements and for the Summary Rating are based upon the evaluator's observation and assessment of the employee's performance of work described within the assigned job description. Ratings fall within the following descriptions: Meets Expectations (ME) is commendable standard and represents that employee consistently meets all or most of the evaluator's expectations in the rating element; the Partially Meets Expectations (PE) rating is for those aspects of performance which require some additional training and development or for performance in certain areas that is not consistent; the Exceeds Expectations (XE) rating reflects work that is regularly beyond expectations; and the Needs Improvement (NI) rating should be assigned when performance continually does not meet performance expectations.

Not all of the Performance Elements will apply to every job, and some may be left blank with a notation of "N/A," or applicable. Lead work and coordination (item #6) rating elements are applicable only to those employees who fall into classifications having these responsibilities.

### **Providing Comments for Performance Elements and the Summary Rating**

Ratings in individual performance elements that are other than ME should be justified with supporting comments in each area. Consult Human Resources before assigning an overall rating of NI, as it may also be appropriate for employees receiving this rating to receive a Needs Improvement Plan (NIP) identifying specific goals, objectives, and timelines for improvement and resources to assist in development must also be identified. Comments for improvement and development may also be applicable when an individual or a summary rating in ME or higher. Comments provided under the Summary Rating section may refer to other areas of the evaluation. It is not necessary to duplicate comments already provided on the evaluation in this section. This section may also be used for any additional comments that are related to the performance evaluation.

### **Completing the Goals Section**

This section shall be used to outline goals for achievement over the next performance evaluation period. Individual employee performance goals must be aligned with the job classification description and should be shared and discussed with the employee prior to being included on the evaluation; goals listed shall reflect action sections from the current evaluation. Performance goals should be Specific, Measurable, Achievable, Relevant, and Time-bound (SMART). Please consult with Human Resources regarding the development of SMART goals.

## Section 2: Performance Elements and Individual Ratings

Circle the appropriate rating for each rating element below.

- **XE** = Meets and Regularly Exceeds Expectations;
- **ME** = Meets Expectations;
- **PE** = Partially Meets Expectations;
- **NI** = Needs Improvement;
- **NA** = Not Applicable (The Evaluation Factor is not relevant to the position).

*To complete this form, click inside the text boxes to enter your information.*

**1. Quality of Work** ☐ **XE** ☐ **ME** ☐ **PE** ☐ **NI** ☐ **NA**

Demonstrates accuracy and thoroughness; displays commitment to excellence and diversity, equity, inclusion, social justice, anti-racism, and accessibility (DEISAA) in alignment to the College's core values; applies feedback to improve performance; monitors own work to ensure quality.

Comments: Include information upon which the evaluation is based.

Action: Indicate recommendations for improvement in this area, including timeframe for completion.

**2. Quantity of Work** ☐ **XE** ☐ **ME** ☐ **PE** ☐ **NI** ☐ **NA**

Completes work in a timely manner; uses time effectively and produces results (is productive).

Comments: Include information upon which the evaluation is based.

Action: Indicate recommendations for improvement in this area, including timeframe for completion.

**3. Attendance** ☐ **XE** ☐ **ME** ☐ **PE** ☐ **NI** ☐ **NA**

Maintains regular attendance by working all required work hours. Do not refer to approved medical absences and approved release time for participation in shared governance committee and/or union activities.

Comments: Include information upon which the evaluation is based.

Action: Indicate recommendations for improvement in this area, including timeframe for completion.

**4. Professional Interactions** ☐ **XE** ☐ **ME** ☐ **PE** ☐ **NI** ☐ **NA**

Establishes and maintains effective work relations by providing quality service, assistance, and support when interacting with the public, vendors, students, and College staff, including individuals from minoritized groups, offers assistance and support to co-workers. Creates a positive learning and working environment that supports diversity, equity, inclusion, social justice, anti-racism, and accessibility (DEISAA) for all members of the campus community. This includes awareness and understanding of diversity.

Comments: Include information upon which the evaluation is based.

Action: Indicate recommendations for improvement in this area, including timeframe for completion.

**5. Initiative** ☐ XE ☐ ME ☐ PE ☐ NI ☐ NA

Understands and accepts new situations; performs well with minimal instruction; makes sound decisions absent of detailed instructions or direct supervision; keeps supervisor informed of status of assigned work.

Comments: Include information upon which the evaluation is based.

Action: Indicate recommendations for improvement in this area, including timeframe for completion.

**6. Lead Work & Coordination (if applicable)** ☐ XE ☐ ME ☐ PE ☐ NI ☐ NA

Understands and accepts new situations; performs well with minimal instruction; makes sound decisions absent of detailed instructions or direct supervision; keeps supervisor informed of status of assigned work. Fulfills lead responsibilities through scheduling employees work, monitoring the accomplishments of day-to-day work in accordance with the College's Core Values, established goals and objectives, and reporting any attendance and/or other concerns to the manager in a timely manner.

Comments: Include information upon which evaluation is based.

Action: Indicate recommendations for improvement in this area, including timeframe for completion.

**Section 3: Summary Rating & Additional Comments**

**7. Overall Performance for Evaluation Period** ☐ XE ☐ ME ☐ PE ☐ NI ☐ NA

The Summary Rating is an overall assessment of the job performance over the evaluation. The overall summary is not necessarily a mathematical average of the rating elements achieved for the individual elements listed above.

Comments: Include information upon which the evaluation is based. This section may also be used for any additional comments that are related to the performance evaluation.

Action for probationary employees: Indicate recommendations for continued employment.

## Section 4: Goals Section

This section shall be used to outline goals for achievement over the next performance evaluation period. Individual employee performance goals must be aligned with the job classification description and should be shared and discussed with the employee prior to being included on the evaluation; goals listed shall reflect action sections from the current evaluation. Performance goals should be Specific, Measurable, Achievable, Relevant, and Time-bound (SMART). Please consult with Human Resources regarding the development of SMART goals.

To add "Goals," click inside the gray box below to enter your information.

## Section 5: Signatures

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Evaluator's Signature

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Date

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Employee's Signature

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Date

*Route completed and signed evaluation to Human Resources for placement in the employee's personnel file.*

*Note: Signing this evaluation form does not necessarily constitute agreement with the evaluation. Employees can attach a written response to this evaluation form within 10 working days if desired.*