

(Completed Clerical Example)



EMPLOYEE PERFORMANCE EVALUATION FORM
PART I - RATED EMPLOYEE IDENTIFICATION
Name (Last, First, MI) Doe, Jane F. Employee I.D. Number Institution
Position Title Administrative Office Supervisor Grade 15 Position Number
PART II - RATER EMPLOYEE IDENTIFICATION
Name of Rater (Last, First, MI) Fanbelt, Lester T. Telephone Number Position Title
PART III - REVIEWING OFFICIAL EMPLOYEE IDENTIFICATION
Name of Reviewing Official (Last, First, MI) Smith, Merrill J. Telephone Number Position Title
PART IV - PERFORMANCE STANDARDS
Duty Area: Responsiveness to Clients Relative Importance: A [X] B [] C []
Standards: Answers phone in a polite, courteous manner before the third ring and always uses the appropriate institutional greeting.
Results: Ms. Doe's performance in this duty area makes her an asset to this institution. To external clientele, she is the "face" of the Division of Agriculture.
Comments/Justification: As stated in the results, Ms. Doe warrants an above average rating in this duty area. Her courteous, customer service attitude that is needed by this organization. Her genuinely friendly demeanor and her helpfulness to external clients are evidence of her commitment to excellence.
Exceeds Standard [] Above Average [X] Satisfactory [] Unsatisfactory []
Duty Area: Document/File Preparation and Maintenance Relative Importance: A [] B [X] C []
Standards: Drafts correspondence according to supervisor's instructions or standard office format with no more than 3 typos or grammatical errors.
Results: A random sampling of her work indicates that Ms. Doe has created documents during this rating period which were generally without error.
Comments/Justification (required for rating other than satisfactory):
Exceeds Standard [] Above Average [] Satisfactory [X] Unsatisfactory []

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Duty Area: Problem Solving/Decision Making	Relative Importance: A <input type="checkbox"/> B <input checked="" type="checkbox"/> C <input type="checkbox"/>
Standards: Takes the initiative to collect and analyze the information necessary to do a task. Considers implications and consequences within and outside the department when choosing options. Evaluates situations and applies a logical and systematic approach to resolution. Anticipates problems and voluntarily takes corrective action. Offers creative solutions. Acts decisively and in a timely manner to meet deadlines.	
Results: Ms. Doe is improving in this area as evidenced through supervisor observation but has not yet fully honed her problem solving and decision-making skills. Ms. Doe should continue to analyze situations from all perspectives and then should consider the implications and consequences of each option before taking action.	
Comments/Justification (required for rating other than satisfactory):	
Exceeds Standard <input type="checkbox"/> Above Average <input type="checkbox"/> Satisfactory <input checked="" type="checkbox"/> Unsatisfactory <input type="checkbox"/>	
Duty Area: Office Management	Relative Importance: A <input checked="" type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/>
Standards: Prepares and accurately maintains itineraries, schedules of events, calendars, and suspense files to remind supervisor of upcoming deadlines at least five days in advance. Prepares travel forms and expense reimbursement requests immediately and in accordance with supervisor directions and institution policy. Maintains inventory control of office supplies and reconciliation of orders versus deliveries so that at least a two week supply is maintained at all times. Maintains up-to-date departmental budgets and account balances at all times. Weeds files on a monthly basis and annually destroys inactive files according to established departmental, state, or federal retention schedules.	
Results: Ms. Doe gives close attention to office operations and accurately maintains assigned itineraries, schedules of events, and calendars. She regularly monitors supply levels to make sure that the inventory is always adequate. She effectively maintains the office budget, reconciling appropriately and making deposits on a daily basis. She completes travel requests and expense reimbursements in accordance with established procedures and in an accurate and timely fashion. Ms. Doe's knowledge of Extension office policies and procedures facilitates the smooth running of the office.	
Comments/Justification (required for rating other than satisfactory):	
Exceeds Standard <input type="checkbox"/> Above Average <input type="checkbox"/> Satisfactory <input checked="" type="checkbox"/> Unsatisfactory <input type="checkbox"/>	
Duty Area: Self Management	Relative Importance: A <input type="checkbox"/> B <input checked="" type="checkbox"/> C <input type="checkbox"/>
Standards: Uses time and resources constructively so that all tasks are completed by deadline. Follows instructions and asks for clarification before beginning the task when instructions are unclear. Organizes and prioritizes work so that assignments are completed as expected within the indicated time frame. Maintains focus on work and deals appropriately with interruptions without allowing them to interfere. Maintains a consistently pleasant and professional attitude toward supervisor and coworkers. Does not abuse leave, attendance, or other institutional policies. Demonstrates the flexibility and adaptability to understand and adopt necessary changes to established practice. Demonstrates honesty, admits error when it occurs, and remains receptive to constructive criticism at all times. Ensures that the security of confidential information is never compromised. Builds trust and credibility by demonstrating reliability and consistency.	
Results: Ms. Does always follows instructions, generally needs no clarification, and continues to use her time and resources effectively so that she completes assigned tasks by deadlines as demonstrated through a random review of her work submitted during this review period. Ms. Doe arrives promptly on time each work day and follows applicable institutional policies. She can be depended upon to exhibit professionalism in carrying out her duties. Her supervisor has observed that she is quick to admit when she has made an error and patient when others make mistakes. Ms. Doe is reliable is handling routine matters and handles sensitive and confidential matters appropriately.	
Comments/Justification (required for rating other than satisfactory):	
Exceeds Standard <input type="checkbox"/> Above Average <input type="checkbox"/> Satisfactory <input checked="" type="checkbox"/> Unsatisfactory <input type="checkbox"/>	

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Duty Area: Teamwork
Relative Importance: A [] B [x] C []

Standards: Supports and works closely with supervisor and coworkers to implement decisions which benefit the entire department.
Results: Ms. Doe goes out of her way to pitch in and help coworkers, even without being asked.

Comments/Justification (required for rating other than satisfactory):
Exceeds Standard [] Above Average [] Satisfactory [x] Unsatisfactory []

Duty Area: Civil Rights/Diversity Compliance
Relative Importance: A [] B [x] C []

Standards: Works to assure a harassment-free work environment for employees or clients with no documented complaints of demeaning attitudes or inappropriate behavior based upon ethnicity, race, religion or gender.
Results: Through observations by her supervisor, it is evident that Ms. Doe is appropriately respectful when interacting with diverse coworkers and clientele on the phone and face-to-face.

Comments/Justification (required for rating other than satisfactory):
Exceeds Standard [] Above Average [] Satisfactory [x] Unsatisfactory []

Duty Area: Supervision
Relative Importance: A [x] B [] C []

Standards: Distributes daily assignments and instructions to support staff, and oversees workflow throughout the day to assure that staffing is adequate and deadlines are met.
Results: Ms. Doe serves as lead secretary for the unit. She effectively trains and provides daily direction to the clerical staff in the office.

Comments/Justification (required for rating other than satisfactory):
Exceeds Standard [] Above Average [] Satisfactory [x] Unsatisfactory []

Complete at the beginning of the rating period: My supervisor and I have established the above duty areas and standards, and I understand my performance during the coming rating period will be measured against them.
Employee's Signature: _____ Date: _____
Rater's Signature: _____ Date: _____
I have reviewed these duty areas and standards and agree that they are appropriate for the position.
Reviewing Official's Signature _____ Date: _____

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PMGS-08-1
Policy and Management Guidelines
Division of Agriculture
January 2008

PART V – OVERALL RATING

Overall Rating – It is understood that an *Unsatisfactory* in any above fields precludes awarding an *Exceeds Standard* or *Above Average* rating during this period. **The overall rating received is determined at the discretion of the rating official.**

Exceeds Standard Above Average Satisfactory Unsatisfactory

Rating Period Beginning Date: _____

Rating Period Ending Date: _____

Yes No

This employee has received a written reprimand or disciplinary notice since the last performance evaluation rating.

By signing below the supervisor verifies that he/she has consulted with the reviewing official on the justification for any overall rating other than "Satisfactory."

Rater's Signature: _____ Date: _____

By signing below the employee concurs only that the performance evaluation has been conducted. The employee's signature does not indicate that he or she agrees with the evaluation. Comments concerning performance may be submitted on a separate sheet.

Employee's Signature: _____ Date: _____

By signing below the supervisor certifies that the performance evaluation has been completed and forwarded to the reviewing official.

Rater's Signature: _____ Date: _____

Reviewing Official's Signature: _____ Date: _____