



PERFORMANCE ASSESSMENT

Employee name:	Position date: / /
Position title:	Hire date: / /
Department:	Period covered by this assessment:
Supervisor's name:	

PERFORMANCE ASSESSMENT PLAN

The Performance Assessment Plan is an assessment program designed to help staff better understand their roles and participate more fully in the achievement of the goals of the College. Planning, goal setting, and personal accountability for results remain the foundations of the performance development process. The plan focuses on performance factors and goals identified in the Strategic Plan.

The objectives of the Performance Assessment Plan are to:

- **Enhance communication between employee and supervisor.**

Dialogue between employees and supervisors should be continuous and should include coaching, guiding, and clarification of job responsibilities in the context of larger organizational goals.

- **Develop employees.**

An employee's development may be related to either current or future positions, and should be continuous to ensure that our institution is able to respond to its quickly changing environment.

- **Achieve superior continuous quality improvement throughout the organization.**

The performance assessment process emphasizes leading and empowering employees. The performance assessment document is designed to guide communications regarding performance and development by providing an outline for important points and objectives. Employees and supervisors are partners in the discussion and in the journey to the achievement of goals.

STRATEGIC GOALS, OBJECTIVES, AND RESULTS

For this section, the employee and supervisor review the results of the established objectives that support Trinity's strategic goals.

STRATEGIC GOAL __:

OBJECTIVE:

RESULTS:

STRATEGIC GOAL __:

OBJECTIVE:

RESULTS:

STRATEGIC GOAL __:

OBJECTIVE:

RESULTS:

PERFORMANCE CRITERIA

A. JOB KNOWLEDGE: The demonstration of technical, administrative, managerial, supervisory or other specialized knowledge required to perform the job. Consider degree of job knowledge relative to length of time in the current position. If applicable, consider the individual's endeavors to increase job knowledge through additional formal or informal study, seminars, readings, and other professional activities, both on and off the job.

<input type="checkbox"/> 1	Unsatisfactory Performance	Displays deficiencies in job knowledge; further training required.
<input type="checkbox"/> 2	Needs Improvement	Shows strength sometimes but is not consistent.
<input type="checkbox"/> 3	Meets Expectations/ Learning Curve	Performs as expected.
<input type="checkbox"/> 4	Exceeds Expectations	Demonstrates average to high level of job knowledge.
<input type="checkbox"/> 5	Outstanding Performance/Results	Demonstrates consistently high level of job knowledge.

Comments:

B. PLANNING AND ORGANIZATIONAL EFFECTIVENESS: The level to which the employee effectively plans, organizes, and implements tasks or programs. Consider the extent to which the employee's performance displays the basic fundamentals of good organization, work planning, and effective time management. Consider the degree to which the employee meets deadlines, handles emergencies, and appropriately establishes goals and priorities. Assess the individual's productivity compared to the expectations of the position.

<input type="checkbox"/> 1	Unsatisfactory Performance	Displays poor planning; lack of organization apparent even in routine assignments; frequently misses deadlines.
<input type="checkbox"/> 2	Needs Improvement	Does routine tasks adequately; has difficulty in managing multiple or complex assignments; occasionally misses deadlines.
<input type="checkbox"/> 3	Meets Expectations/ Learning Curve	Displays adequate ability to plan, organize, and implement tasks and programs effectively and on time. Performs as expected.
<input type="checkbox"/> 4	Exceeds Expectations	Displays average or better ability to plan, organize, and implement tasks and programs effectively and on time.
<input type="checkbox"/> 5	Outstanding Performance/Results	Displays outstanding ability to plan, organize, implement tasks and programs, and meet deadlines.

Comments:

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C. COMMUNICATION: How effective the employee represents the department and the entire College. Consider how well the employee represents the College and works to ensure positive and effective communication with outside contacts. Consider the level to which employee's communication is precise, factual, and well-organized, and the level to which employee inspires confidence in both the department and in the College as a whole.

<input type="checkbox"/> 1	Unsatisfactory Performance	Displays an inability to communicate clearly.
<input type="checkbox"/> 2	Needs Improvement	Sometimes lack clarity or conciseness; generally can communicate desired information.
<input type="checkbox"/> 3	Meets Expectations/ Learning Curve	Communicates in an organized, clear, and concise manner.
<input type="checkbox"/> 4	Exceeds Expectations	An excellent communicator; can communicate complex information.
<input type="checkbox"/> 5	Outstanding Performance/Results	An outstanding communicator; can communicate complex information extremely well.

Comments:

D. INTERPERSONAL RELATIONS: How well the employee gets along with other individuals in the performance of job duties. Consider effectiveness of relations with co-workers, subordinates, supervisor and, if applicable, the general College community, including public handling of position responsibilities. Consider the employee's cooperativeness, tact, courtesy, and customer service.

<input type="checkbox"/> 1	Unsatisfactory Performance	Has difficulty relating to others; not readily cooperative.
<input type="checkbox"/> 2	Needs Improvement	Relates to others fairly well; works better with some people than others.
<input type="checkbox"/> 3	Meets Expectations/ Learning Curve	Works well with others; facilitates cooperation.
<input type="checkbox"/> 4	Exceeds Expectations	Is effective interpersonally; works well with subordinates, peers, and superiors.
<input type="checkbox"/> 5	Outstanding Performance/Results	Is very effective interpersonally; works extremely well with subordinates, peers, and superiors.

Comments:

E. TEAM PLAYER: The level of enthusiasm, dedication, and interest displayed regarding position responsibilities and commitment to Trinity College. Consider whether the employee expresses willingness to undertake projects, supports organizational and strategic goals, and demonstrates flexibility in response to changing circumstances.

<input type="checkbox"/> 1	Unsatisfactory Performance	Generally displays negativity toward job/College; criticizes without offering constructive suggestions; inflexible.
<input type="checkbox"/> 2	Needs Improvement	Accepts job duties, occasionally with reluctance.
<input type="checkbox"/> 3	Meets Expectations/ Learning Curve	Displays interest in duties and responsibilities; flexible in response to changing circumstances.
<input type="checkbox"/> 4	Exceeds Expectations	Dedicated and enthusiastic; very flexible in response to changing circumstances.
<input type="checkbox"/> 5	Outstanding Performance/Results	Highly dedicated and enthusiastic; strongly supportive of Trinity's goals.

Comments:

F. INITIATIVE: The degree to which the employee is self-starting and assumes responsibilities without specific direction. Consider how well the employee follows through on assignments, taking appropriate independent action when necessary and relative amount of supervision required.

<input type="checkbox"/> 1	Unsatisfactory Performance	Needs detailed instructions; requires constant supervision to keep assignments going.
<input type="checkbox"/> 2	Needs Improvement	Follows through on some assignments without continuous direction.
<input type="checkbox"/> 3	Meets Expectations/ Learning Curve	Follows through on assignments; performs as expected.
<input type="checkbox"/> 4	Exceeds Expectations	A self-starter; follows through on assignments independently.
<input type="checkbox"/> 5	Outstanding Performance/Results	Exceptionally self-reliant; completely follows through on assignments.

Comments:

G. RESOURCEFULNESS: Extent to which employee devises ways and means to deal with challenges in the performance of job duties. Consider employee's recommendations for the modification of existing methods or procedures to meet new or changing circumstances and the development of new ideas or methods.

<input type="checkbox"/> 1	Unsatisfactory Performance	Rarely develops more effective ways of handling assignments.
<input type="checkbox"/> 2	Needs Improvement	Occasionally offers worthwhile ideas and suggestions when encouraged to do so.
<input type="checkbox"/> 3	Meets Expectations/ Learning Curve	Has necessary resourcefulness to devise or suggest new methods, or modify existing ones, to meet changing circumstances.
<input type="checkbox"/> 4	Exceeds Expectations	Makes worthwhile suggestions; readily develops innovative ideas and solutions to problems.
<input type="checkbox"/> 5	Outstanding Performance/Results	Frequently makes worthwhile suggestions; readily develops ideas and solutions to problems.

Comments:

H. JUDGMENT: Evidence of ability to analyze available data or circumstances concerning a situation, develop alternative solutions, and recommend or select a proper course of action.

<input type="checkbox"/> 1	Unsatisfactory Performance	Makes frequent errors in judgment; often overlooks consequences of decisions.
<input type="checkbox"/> 2	Needs Improvement	Judgment is usually sound under normal circumstances; occasionally exercises questionable judgment.
<input type="checkbox"/> 3	Meets Expectations/ Learning Curve	Exercises good judgment; aware of impact of decisions on related areas.
<input type="checkbox"/> 4	Exceeds Expectations	Exercises good judgment; foresees and evaluates impact of decisions on related areas.
<input type="checkbox"/> 5	Outstanding Performance/Results	Exceptionally sound and sensible; foresees and evaluates impact of decisions on related areas.

Comments:

I. SUPERVISORY ABILITY: COMPLETE ONLY FOR INDIVIDUALS WITH SUPERVISORY RESPONSIBILITY. Extent to which the employee applies sound, acceptable supervisory practices in the execution of his/her supervisory responsibilities. Consider evidence of demonstrated effectiveness in the hiring and developing personnel.

<input type="checkbox"/> 1	Unsatisfactory Performance	Causes morale problems; does not adequately handle employee relations.
<input type="checkbox"/> 2	Needs Improvement	Somewhat competent as supervisor but is not consistent.
<input type="checkbox"/> 3	Meets Expectations/ Learning Curve	Competent as supervisor; performs as expected.
<input type="checkbox"/> 4	Exceeds Expectations	Encourages subordinates in self-development; creates and maintains a comfortable, cooperative work environment.
<input type="checkbox"/> 5	Outstanding Performance/Results	Dynamically leads subordinates to discover their own potential within their positions; provides inspiration and outstanding leadership to subordinates.

Comments:

J. PROFESSIONAL DEVELOPMENT AND TRAINING: Extent to which the employee has participated in the Trinity Institute or other personal or professional development activities.

<input type="checkbox"/> 1	Unsatisfactory Performance	Has not participated in any internal or external professional development or training
<input type="checkbox"/> 2	Needs Improvement	Has completed two or less courses or (6) credits of professional development or training
<input type="checkbox"/> 3	Meets Expectations/ Learning Curve	Has completed three courses or nine (9) credits of professional development or training. First year staff member must complete twelve (12) credits.
<input type="checkbox"/> 4	Exceeds Expectations	Has completed at least four courses or twelve (12) credits of professional development or training
<input type="checkbox"/> 5	Outstanding Performance/Results	Has completed at least six courses or eighteen (18) credits of professional development or training and/or has delivered at least one staff training course.

Comments:

K. OVERALL EVALUATION: The overall evaluation should reflect the assessment of the employee's total performance, based upon all the above criteria. In making assessment, consider the criteria according to the employee's duties and responsibilities, taking care not to overemphasize one particular criterion.

<input type="checkbox"/> 1	Unsatisfactory Performance	Improvement is required in order to perform at an acceptable level.
<input type="checkbox"/> 2	Needs Improvement	Generally performs adequately; need for improvement in specific areas is evident.
<input type="checkbox"/> 3	Meets Expectations/ Learning Curve	Performs as expected; meets expectations.
<input type="checkbox"/> 4	Exceeds Expectations	Performs duties and responsibilities well; occasionally excels.
<input type="checkbox"/> 5	Outstanding Performance/Results	A noteworthy employee; this employee is a top performer.

Comments:

L. OPPORTUNITIES FOR IMPROVEMENTS: Based on overall performance for this review period. List the areas in which the employee has opportunities for improvements.

M. NEW OBJECTIVES FOR THE NEXT PERFORMANCE ASSESSMENT PERIOD:

Signature of Supervisor

/ /
Date

Signature of Next Level Supervisor

/ /
Date
(Before Assessment Discussion)

Signature of Director of Human Resources

/ /
Date
(Before Assessment Discussion)

		/ /
Signature of Employee*		Date

* Signature indicates only that the assessment has been reviewed and does not necessarily signify agreement. A response to this assessment may be made on separate sheet and attached.