



Employee Name	Position Title
Department	Supervisor
Period Covered (MM/YY to MM/YY) to	Date of Completed Review
Review Type <input type="checkbox"/> Annual <input type="checkbox"/> Promotion/Transfer <input type="checkbox"/> Probationary (1 year) <input type="checkbox"/> Other:	

**Instructions**

- On this form, "employee" refers to the employee being evaluated; "supervisor" refers to the evaluator.
- If you are completing the form electronically, you may type comments in the shaded areas. These areas will expand to accept any length of comment. If you are asked to select an option from a group of predetermined answers, you may click on the appropriate box to mark it with an "X". This document may be saved at any time.
- In advance of the performance review meeting, the employee's job description (on file with Human Resources) must be reviewed by both the employee and the supervisor. Check appropriate box below and initial when review has been completed.

- Job description has been reviewed and is accurate. **Employee** \_\_\_\_\_ **Supervisor** \_\_\_\_\_
- Job description requires revision. Revised job description is attached. **Employee** \_\_\_\_\_ **Supervisor** \_\_\_\_\_

- Employee and supervisor review performance goals and objectives from the last review period and complete Section II together. Preliminary discussion of goals for next period begins.
- Employee completes self-review by checking "self" box at appropriate rating level for each performance factor in Section III. Employee also completes Section IV. Employee then forwards form to supervisor for completion.
- Supervisor reviews self- review and completes review of the employee by checking "supervisor" box at the appropriate rating level for each performance factor in Section III. Supervisor completes Section V.
- The completed review form is forwarded to the supervisor's supervisor, the "Reviewing Officer" for review. The Reviewing Officer checks box below and initials finalized performance review verifying that this step was completed.

- I have reviewed this review prior to it being given to the employee. **Reviewing Officer** \_\_\_\_\_

- The employee's direct supervisor arranges meeting with employee and provides employee with a copy of the review prior to the meeting.
- During the performance review meeting, employee and supervisor discuss the completed performance review and complete Section VI.
- A finalized performance review form is completed and signatures are obtained for Section I. Employee and the supervisor keep an electronic and paper copy of the completed review for their records. The signed original is forwarded the Office of Human Resources.

**Section I – ACKNOWLEDGMENT & SIGNATURES**

*I have reviewed this evaluation and discussed its contents with my supervisor. My signature indicates that I have been advised of my performance status. In addition to signing, I have checked the appropriate box below indicating my agreement or disagreement with this review.*

- I agree with this evaluation.
- I disagree with this evaluation and would like to discuss the review with the Director of Human Resources.

\_\_\_\_\_  
*Employee* *Date*

\_\_\_\_\_  
*Supervisor* *Date*

\_\_\_\_\_  
*Supervisor's Supervisor* *Date*

## Section II. JOB PERFORMANCE FACTORS

For each performance factor, check the box that most closely matches your assessment. Employee checks only the "Self" boxes. Supervisor checks only the "Supervisor" boxes.

	Does Not Meet Expectations		Meets Expectations		Exceeds Expectations	
<b>Customer Service</b> Mission: Hospitality	Self <input type="checkbox"/>	Supervisor <input type="checkbox"/>	Self <input type="checkbox"/>	Supervisor <input type="checkbox"/>	Self <input type="checkbox"/>	Supervisor <input type="checkbox"/>
	Rarely responds to customer needs in a helpful manner. Often rude and offensive.		Usually responds to customer needs in a friendly, helpful, respectful, timely and courteous manner.		Dependently responds to customer needs in a friendly, helpful, respectful, timely and courteous manner. Continually anticipates customer needs; goes out of way to assist people. Able to respond appropriately to more than one customer at a time. Creates good will for the department and College.	
Employee Comments:						
Supervisor Comments:						
<b>Teamwork</b> Mission: Respect the whole person	Self <input type="checkbox"/>	Supervisor <input type="checkbox"/>	Self <input type="checkbox"/>	Supervisor <input type="checkbox"/>	Self <input type="checkbox"/>	Supervisor <input type="checkbox"/>
	Rarely cooperates with or assists others. Ineffective team member who is defensive, argumentative and/or has a negative effect on others.		Willing to work with others within and across departments. Effective team member who works pleasantly and cooperatively towards common goals and shares the credit.		Initiates cooperative projects and voluntarily assists others within and across departments. Excellent team member who consistently and reliably works pleasantly and cooperatively towards common goals and shares the credit.	
Employee Comments:						
Supervisor Comments:						
<b>Quality &amp; Quantity of Work</b> Position Description	Self <input type="checkbox"/>	Supervisor <input type="checkbox"/>	Self <input type="checkbox"/>	Supervisor <input type="checkbox"/>	Self <input type="checkbox"/>	Supervisor <input type="checkbox"/>
	Work is unusable due to errors and/or poor organization. Frequently misses deadlines. Work volume consistently below standard. Failure to follow policies, procedures and external regulations puts College at risk.		Work is thorough, logical, accurate and neat. Manages required volume of work in a timely manner. Follows policies, procedures and external regulations.		Consistently produces work that is thorough, logical, innovative, accurate and neat. Manages high volume of work in a timely manner. Follows policies, procedures and external regulations.	
Employee Comments (use position description as foundation and description of comments):						
Supervisor Comments (use position description as foundation and description of comments):						

	<b>Does Not Meet Expectations</b>		<b>Meets Expectations</b>		<b>Exceeds Expectations</b>	
<b>Attendance</b> Fundamental Expectation	Self <input type="checkbox"/>	Supervisor <input type="checkbox"/>	Self <input type="checkbox"/>	Supervisor <input type="checkbox"/>	Self <input type="checkbox"/>	Supervisor <input type="checkbox"/>
	Attendance and/or communication about absences, schedule and scheduling conflicts are unreliable. Inflexible with scheduling and leave requests. Uses leave time inappropriately.		Usually attends work and communicates with supervisor about absences, schedule and scheduling conflicts. Willing to be flexible.		Dependably attends work and always communicates with supervisor about absences, schedule and scheduling conflicts. Carefully considers College and departmental needs and balances with personal interests. Willingly flexible. Makes appropriate arrangements to ensure delays in arrival or absences minimally impact work.	
Employee Comments:						
Supervisor Comments:						
<b>Organization</b> Position Description	Self <input type="checkbox"/>	Supervisor <input type="checkbox"/>	Self <input type="checkbox"/>	Supervisor <input type="checkbox"/>	Self <input type="checkbox"/>	Supervisor <input type="checkbox"/>
	Rarely organizes workload for effective and timely completion. Frequently loses concentration when faced with many tasks.		Balances attention to short- and long-term work objectives; organizes and prioritizes for effective and timely completion of workload. Handles multiple tasks well.		Balances attention to short- and long-term work objectives; organizes and prioritizes for effective and timely completion of workload. Highly skilled at multi-tasking. Able to reprioritize as changing situations require. Communicates work plan to supervisor and other stakeholders.	
Employee Comment (use position description as foundation and description of comments):						
Supervisor Comments:(use position description as foundation and description of comments):						
<b>Problem Solving</b> Position Description	Self <input type="checkbox"/>	Supervisor <input type="checkbox"/>	Self <input type="checkbox"/>	Supervisor <input type="checkbox"/>	Self <input type="checkbox"/>	Supervisor <input type="checkbox"/>
	Rarely anticipates or understands work-related problems. Requires supervisory intervention to correct actions taken.		Usually demonstrates thorough understanding of problems; recommends sound alternative approaches and corrective actions. Recognizes new opportunities and develops imaginative strategies.		Consistently anticipates and demonstrates thorough understanding of problems; develops insightful alternative approaches and corrective actions. Recognizes new opportunities and develops imaginative strategies. Sees larger picture and implications of solutions within and across departments.	
Employee Comment (use position description as foundation and description of comments):						
Supervisor Comments:(use position description as foundation and description of comments):						

	<b>Does Not Meet Expectations</b>		<b>Meets Expectations</b>		<b>Exceeds Expectations</b>	
<b>Judgment</b> Position Description	Self <input type="checkbox"/>	Supervisor <input type="checkbox"/>	Self <input type="checkbox"/>	Supervisor <input type="checkbox"/>	Self <input type="checkbox"/>	Supervisor <input type="checkbox"/>
	Poor; fails to consider facts or relationships involved in decisions. Decisions are narrowly-based and ill-conceived for the circumstances. Oftentimes may fail to confer with or refer action to others as appropriate.		Makes informed timely, discerning, and sensitive decisions. Confers with and refers actions to others as appropriate. Considers facts or relationships involved and acts appropriately.		Carefully and consistently makes thoroughly informed, timely, discerning, and sensitive decisions. Evaluates complexity of situations and potential outcomes of decisions. Integrates department needs into College-wide priorities. Confers with and refers actions to others as appropriate.	
Employee Comment (use position description as foundation and description of comments):						
Supervisor Comments:(use position description as foundation and description of comments):						
<b>Initiative</b> Fundamental Expectation	Self <input type="checkbox"/>	Supervisor <input type="checkbox"/>	Self <input type="checkbox"/>	Supervisor <input type="checkbox"/>	Self <input type="checkbox"/>	Supervisor <input type="checkbox"/>
	Rarely starts and moves ahead with projects. Dependent on direction from others. Requires constant monitoring.		Performs duties on own; can cope with irregularities. Reliably identifies appropriate new areas for action. Follows through until tasks are completed.		Consistently starts and moves ahead with all projects. Reliably identifies appropriate new areas for action. Follows through until tasks are completed. Communicates with supervisor regarding any delays. Sets challenging goals for self.	
Employee Comments:						
Supervisor Comments:						
<b>Oral Communication</b> Position Description	Self <input type="checkbox"/>	Supervisor <input type="checkbox"/>	Self <input type="checkbox"/>	Supervisor <input type="checkbox"/>	Self <input type="checkbox"/>	Supervisor <input type="checkbox"/>
	Rarely selects the best form of communication for the situation to the appropriate individuals. Response often slow, insensitive, unclear or violates confidentiality. May not listen to others. Interactions tend to be tactless, obstructive or offensive.		Usually selects the best form of communication for the situation. Responds clearly, sensitively, accurately and tactfully; listens to others. Maintains confidentiality.		Consistently selects the best form of communication for the situation to the appropriate individuals. Responds clearly, sensitively, accurately, persuasively and diplomatically. Checks to ensure that communication is understood and validates others' communications. Always maintains confidentiality.	
Employee Comment (use position description as foundation and description of comments):						
Supervisor Comments (use position description as foundation and description of comments)::						

	<b>Does Not Meet Expectations</b>		<b>Meets Expectations</b>		<b>Exceeds Expectations</b>	
<b>Written Communication</b> Position Description	Self <input type="checkbox"/>	Supervisor <input type="checkbox"/>	Self <input type="checkbox"/>	Supervisor <input type="checkbox"/>	Self <input type="checkbox"/>	Supervisor <input type="checkbox"/>
	Rarely selects the appropriate form of communication for the situation. Response often slow, insensitive, unclear or violates confidentiality. Writing is rarely organized, logical, concise, grammatically correct or stylistically appropriate. Requires extensive editing and correction.		Usually selects the appropriate form of communication for the situation. Documents are usually clear, concise, organized, logical, accurate, comprehensive, grammatically correct and stylistically appropriate. Always maintains confidentiality.		Consistently selects the appropriate form of communication for the situation. Checks to ensure that communication is understood. Documents are clear, concise, organized, logical, accurate, comprehensive, grammatically correct and stylistically appropriate. Writing is consistently insightful, persuasive and engaging. Always maintains confidentiality.	
Employee Comment (use position description as foundation and description of comments):						
Supervisor Comments (use position description as foundation and description of comments):						
<b>Goal Setting</b> Position Description	Self <input type="checkbox"/>	Supervisor <input type="checkbox"/>	Self <input type="checkbox"/>	Supervisor <input type="checkbox"/>	Self <input type="checkbox"/>	Supervisor <input type="checkbox"/>
	Rarely sets goals. Goals that are set are rarely accomplished or consistently accomplished unsatisfactorily.		Sometimes develops goals. Goals are related to Carroll's strategic initiatives and are mostly accomplished satisfactorily.		Consistently develops goals that support College's strategic initiatives. Communicates regularly to assess progress of and status towards reaching goals and offer assistance. When goals are not met, supervisor and staff evaluate relevant causes and use this analysis to guide future goals.	
Employee Comment (use position description as foundation and description of comments):						
Supervisor Comments (use position description as foundation and description of comments):						

### **Section III. OVERALL SUMMARY OF PERFORMANCE – SELF REVIEW**

*Please provide below a description of your overall performance during the review period. Use this space to provide comments relating to the performance factors. Include major accomplishments, strengths and areas where improvement may be needed. Shaded areas will expand as you type and will accept any comment length.*

#### **Accomplishments**

#### **Strengths**

#### **Areas for Development/Improvement:**

A development plan must be included and submitted to the Office of Human Resources for any performance factor that the employee marked with less than a successful performance rating.

The development plan must include:

- Required Training, if applicable.
- Methods and Strategies Used for Improving Performance.
- Measurements Used for Assessing Performance.
- Goals of Achievement for Satisfactory Performance.

### **Section IV. OVERALL SUMMARY OF PERFORMANCE – SUPERVISOR'S REVIEW**

*Please provide below a description of this employee's overall performance during the review period. Use this space to provide comments relating to the performance factors. Include major accomplishments, strengths and areas where improvement may be needed. Shaded areas will expand as you type and will accept any comment length.*

#### **Accomplishments**

#### **Strengths**

#### **Areas for Development/Improvement:**

A development plan must be included and submitted to the Office of Human Resources for any performance factor that the supervisor marked with less than a successful performance rating.

The development plan must include:

- Required Training, if applicable.
- Methods and Strategies Used for Improving Performance.
- Measurements Used for Assessing Performance.
- Goals of Achievement for Satisfactory Performance.

**Section V. PERFORMANCE GOALS & OBJECTIVES FROM LAST REVIEW**

**Review of goal achievements is a collaborative exercise between the employee and supervisor.**

*Transfer goals and objectives from last year's review form. All employees must have at least one (1) goal.*

*Shaded areas will expand as you type and will accept any comment length.*

*For supervisors/departments who utilize TracDat for Strategic Planning and Goal-setting, please indicate that resource and guidance here: \_\_\_\_\_*

Goal:				
Not Met <input type="checkbox"/>	Partially Achieved <input type="checkbox"/>	Achieved <input type="checkbox"/>	Exceeded <input type="checkbox"/>	Target Date:
How was this goal measured?:				
Goal:				
Not Met <input type="checkbox"/>	Partially Achieved <input type="checkbox"/>	Achieved <input type="checkbox"/>	Exceeded <input type="checkbox"/>	Target Date:
How was this goal measured?:				
Goal:				
Not Met <input type="checkbox"/>	Partially Achieved <input type="checkbox"/>	Achieved <input type="checkbox"/>	Exceeded <input type="checkbox"/>	Target Date:
How was this goal measured?:				
Goal:				
Not Met <input type="checkbox"/>	Partially Achieved <input type="checkbox"/>	Achieved <input type="checkbox"/>	Exceeded <input type="checkbox"/>	Target Date:
How was this goal measured?:				
Goal:				
Not Met <input type="checkbox"/>	Partially Achieved <input type="checkbox"/>	Achieved <input type="checkbox"/>	Exceeded <input type="checkbox"/>	Target Date:
How was this goal measured?:				

## Section VI. PERFORMANCE GOALS & OBJECTIVES

Goals should be specific, measurable, achievable, and realistic) and include a target date for completion. When setting a goal, think about improving customer service, staff development, strategic College initiatives, departmental goals, and the mission of the College. Employee should understand how his/her goals support the College's mission and strategic initiatives. Regular meetings should be scheduled throughout the year to assess and document progress toward meeting these performance objectives. All employees must have at least one (1) goal. Shaded areas will expand as you type and will accept any comment length.

For supervisors/departments who utilize TracDat for Strategic Planning and Goal-setting, please indicate that resource and guidance here: \_\_\_\_\_

Goal:
Target Date:
Goal:
Target Date:
Goal:
Target Date:
Goal:
Target Date:
Goal:
Target Date:

## SECTION VII: DISCUSSION OF MISSION

Carroll College is a Catholic, diocesan, liberal arts college in the ecumenical tradition of the Second Vatican Council. The Performance Review exercise provides an opportunity to engage employees and supervisors in meaningful conversations about how each and every employee is an ambassador to and for Carroll College's Catholic identity as it relates to its overall educational mission. Born out of our Catholic tradition, we have a strong calling to work together for the common good. As such, the employee and supervisor will discuss the following key characteristics of the Carroll College mission statement with regard to the employee's role and position at Carroll College.

- 1) The employee contributes to a welcoming and supportive environment for our students and each other, his/her faculty and staff colleagues, to support and fulfill all Carroll students' academic and personal potential.  
Comments:
- 2) The employee places the needs of co-workers before his/her own and contributes to a collaborative, productive, and proficient work environment.  
Comments:



- 3) The employee contributes to Carroll's relationship with the Helena community (e.g., participation in local organizations, activities and events), especially its service to the poor.

Comments:

- 4) The employee's allocation of resources that he/she uses in performing his/her job demonstrates a commitment to and value of the care, management and stewardship of those resources when supporting Carroll's core values of providing service to students, faculty, staff, donors, and/or friends of Carroll College.

Comments:

- 5) Employee feels free to learn and grow personally and/or spiritually, regardless of religious affiliation.

Comments: