



INSTRUCTIONS FOR COMPLETING THE EMPLOYEE EVALUATION FORM

PART I - ADMINISTRATIVE DATA

USING YOUR MOUSE, CLICK IN EACH FIELD TO ENTER APPROPRIATE INFORMATION. **DO NOT USE THE TAB KEY TO MOVE FROM FIELD TO FIELD.**

PART II - AUTHENTICATION DATA

- a. TYPE YOUR NAME, TITLE, SIGNATURE AND DATE.
- b. TYPE THE NAME AND TITLE OF THE INTER-DEPARTMENT RATER (IF APPLICABLE). SIGNATURE AND DATE WILL BE ACQUIRED AFTER COMPLETION.
- c. TYPE THE NAME AND TITLE OF THE REVIEWER. SIGNATURE AND DATE WILL BE ACQUIRED AFTER COMPLETION.
- d. TYPE YOUR EMAIL ADDRESS IN THIS FIELD.
- e. EMPLOYEE SIGNATURE AND DATE SHOULD BE OBTAINED AT THE TIME OF THE REVIEW.

PART III - JOB DESCRIPTION

- a. ENTER THE JOB TITLE OF THE EMPLOYEE BEING RATED.
- b. ENTER THE EFFECTIVE DATE OF THE JOB DESCRIPTION FOR THE EMPLOYEE YOU ARE EVALUATING. YOU MAY OBTAIN A JOB DESCRIPTION BY CONTACTING MARILYN HALL IN THE HUMAN RESOURCE DEPARTMENT AT 767-8224.
- c. ENTER THE CORRESPONDING JOB CODE FOR THE EMPLOYEE BEING EVALUATED. YOU MAY OBTAIN THIS CODE BY ACCESSING THE JOB INFORMATION PAGE IN PEOPLESOFT OR REFER TO THE TOP ON THE JOB DESCRIPTION.
- d. TYPE THE DESCRIPTION OF THE JOB DUTIES USING THE JOB DESCRIPTION YOU OBTAINED FROM THE BUSINESS OFFICE WEB SITE AT: <http://businessoffice.spps.org> [Click on Performance Management](#) , then enter the password to enter.

PART IV - PERFORMANCE EVALUATION - PROFESSIONALISM - CHARACTER

DISPOSITION OF THE LEADER: COMBINATION OF VALUES, ATTRIBUTES, AND SKILLS AFFECTING LEADER ACTION.

a. VALUES

SELECT THE "YES" OR "NO" RADIO BUTTON THAT DESCRIBES THE BEHAVIORS AND JUDGMENTS OF THE INDIVIDUAL. ANY VALUES ASSESSED "NO" REQUIRE COMMENTS. (e.g., a.1. SERVICE OVER SELF - Rarely places organization over personal interests in judgments and decisions).

GENERAL INSTRUCTIONS

IN THIS SECTION YOU ARE CREATING A WORD PICTURE OF THE PERSON EVALUATED. FOR EACH CRITERION LISTED BELOW CLICK ON THE DROP DOWN LIST TO SELECT MEETS STANDARD, EXCEEDS STANDARD, OR NEEDS IMPROVEMENT. FOLLOW THIS PROCESS:

ATTRIBUTES: SELECT THE APPROPRIATE RATING FROM THE DROP DOWN LIST FOR EACH ATTRIBUTE LISTED.

SKILLS: SELECT THE APPROPRIATE RATING FROM THE DROP DOWN LIST FOR EACH SKILL LISTED.

ACTIONS: SELECT THE APPROPRIATE RATING FROM THE DROP DOWN LIST FOR EACH ACTION LISTED.

b. LEADER ATTRIBUTES / SKILLS / ACTIONS

USING THE DROP DOWN LIST, SELECT THE RATING THAT BEST DESCRIBES THE PROFICIENCY LEVEL FOR EACH ATTRIBUTE, SKILL AND ACTION. COMMENTS ARE MANDATORY FOR ALL "NEEDS IMPROVEMENT" SELECTIONS.

b.1. **ATTRIBUTES** - FUNDAMENTAL QUALITIES AND CHARACTERISTICS.

b.2. **SKILLS** (Competence) - SKILL DEVELOPMENT IS PART OF SELF DEVELOPMENT; PREREQUISITE TO ACTION.

b.3. **ACTIONS (LEADERSHIP)** - MAJOR ACTIVITIES LEADER PERFORMS INFLUENCING, OPERATING, AND IMPROVING.

PART V - PERFORMANCE AND POTENTIAL EVALUATION IMPROVEMENT

- a. CHECK THE BOX THAT BEST DESCRIBES THE EMPLOYEES PERFORMANCE RATING DURING THE RATING PERIOD; (MEETS STANDARD, EXCEEDS STANDARD, OR NEEDS IMPROVEMENT.) IF "NEEDS IMPROVEMENT" IS SELECTED AN IMPROVEMENT PLAN MAY BE DEVELOPED. AN INDIVIDUAL WORK PLAN WORKSHEET CAN BE FOUND ON THE WEBSITE AT http://businessoffice.spps.org/evaluation_forms.html
- b. RATER COMMENTS: ENTER COMMENTS RELATING TO PERFORMANCE AND FOR ALL "NEEDS IMPROVEMENT" RATINGS.
- c. CHOOSE THE APPROPRIATE BOX WHICH INDICATES THE OVERALL RATING DURING THE EVALUATION PERIOD:

NO WORK PLAN - Continue to PART VI of the evaluation form.

WORK PLAN - Enter the following:

- 1) The effective date of the Work Plan.
- 2) The effective date for follow-up.
- 3) Enter comments for regarding work plan and follow-up dates if necessary.
- 4) Recommendations for improvement as necessary.

PART VI - PROFESSIONAL DEVELOPMENT

- a. ENTER ANY FORMAL CLASSES THE EMPLOYEE ATTENDED DURING THE RATING PERIOD IN THE COMMENT BOX.
- b. ENTER PLANNED TRAINING/PROFESSIONAL DEVELOPMENT RECOMMENDATIONS FOR THE NEXT RATING PERIOD IN THE COMMENT BOX.
- c. LIST THREE FUTURE ASSIGNMENTS FOR WHICH THE EMPLOYEE MAY BE BEST SUITED.

WHEN COMPLETE, EMAIL THIS FORM TO THE REVIEWER (YOUR SUPERVISOR). THE REVIEWER WILL EITHER RETURN THE FORM TO YOU APPROVED, OR ASK YOU TO MAKE CHANGES. ONCE APPROVED, YOU MAY SCHEDULE THE PERFORMANCE EVALUATION WITH THE EMPLOYEE.

AFTER THE PERFORMANCE EVALUATION HAS BEEN COMPLETED, ATTACH THIS FORM IN AN EMAIL TO: HRPerf.Eval@spps.org

THIS DOCUMENT WILL BE ATTACHED TO THE EMPLOYEE SYSTEM OF RECORD.