

**EASTERN MICHIGAN UNIVERSITY**  
**Performance Management Review Form for Office Professional Staff**

**EMPLOYEE NAME:** \_\_\_\_\_ **DEPARTMENT:** \_\_\_\_\_  
**EID:** \_\_\_\_\_ **DIVISION:** \_\_\_\_\_

**CLASSIFICATION TITLE:** \_\_\_\_\_ **SALARY GRADE:** \_\_\_\_\_  
**CAMPUS ADDRESS:** \_\_\_\_\_

**TYPE OF REVIEW:**  Annual  Probationary  Special \_\_\_\_\_

**REVIEW PERIOD:** From \_\_\_\_\_ to \_\_\_\_\_

**RATING SCALE**

- 1 = **CONSISTENTLY** demonstrates the behavior or skill  
2 = **FREQUENTLY** demonstrates the behavior or skill  
3 = **OCCASIONALLY** demonstrates the behavior or skill  
4 = **RARELY OR NEVER** demonstrates the behavior or skill  
NA = Not Applicable to this Employee

BEHAVIOR/SKILL	1	2	3	4	NA	COMMENTS
<b>1. Job Knowledge/Competence (overall score)</b>						
a. Demonstrates knowledge of the job duties						
b. Quickly grasps new assignments						
c. Follows applicable policies & procedures						
d. Solves work problems and removes obstacles						
e. Knows how to use the software and business machines needed in the job						
f. Demonstrates writing and math skills needed in the job						
g. Performs duties with minimal supervision but seeks guidance where and when appropriate to do the job						
<b>2. Quality and Quantity of Work (overall score)</b>						
a. Completes assignments accurately and neatly						
b. Proofreads materials and corrects mistakes						
c. Maintains high work quality even when under pressure						
d. Effectively handles multiple tasks and assignments						
e. Willingly takes on extra work						
f. Suggests improvements and new ways to do the work						
<b>3. Interpersonal Effectiveness and Professionalism (overall score)</b>						
a. Respects confidentiality and privacy rights of others						
b. Speaks and acts professionally in conversations about students, colleagues and the University.						
c. Appropriately shares information and resources						
d. Seeks opportunities for professional development						
e. Exhibits appropriate attire and grooming						
f. Maintains effective work relationships with others						
g. Effectively supervises those who report to him/her						
h. Maintains a professional and orderly work area						

<b>BEHAVIOR/SKILL</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>NA</b>	<b>COMMENTS</b>
<b>4. Dependability (overall score)</b>						
a. Meets University/departamental attendance standards						
b. Starts work and leaves work at the appropriate time						
c. Respects time allowed for breaks and lunch						
d. Arrives at meetings and appointments on time						
e. Schedules time off in advance (except in an emergency situation)						
f. Follows policies for requesting and reporting time off						
g. Helps ensure work duties are covered when absent						
h. Completes assignments on time						
<b>5. Customer Service (overall score)</b>						
a. Treats "customers" with courtesy, tact and respect						
b. Listens to a problem and takes responsibility for solving it						
c. Knows when and how to refer the problem to others						
d. Promptly attends to "customers" who come to the office or phone the office						
e. Goes "beyond the minimum" to help others						
<b>6. Optional Performance Factors Specific to this Position (overall score)</b>						
a.						
b.						
c.						
d.						
e.						
f.						
g.						

**OVERALL RATING OF PERFORMANCE:**

**Taking into account all of the performance factors listed above, overall, this employee:**

- CONSISTENTLY demonstrated the behaviors and skills needed to perform the job; routinely and significantly exceeded normal expectations for the job.
- FREQUENTLY demonstrated the behaviors and skills needed to perform the job, often exceeded normal expectations for the job.
- OCCASIONALLY demonstrated the behaviors and skills needed to perform the job, met some normal expectations for the job but improvements are needed in several areas of performance.
- RARELY OR NEVER demonstrated the behaviors and skills needed to perform the job; failed to meet normal expectations for the job in a number of critical areas of performance.

**EVALUATOR'S COMMENTS:**

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**ACKNOWLEDGEMENT BY EVALUATOR(S)**

Name of Evaluator: \_\_\_\_\_ Title: \_\_\_\_\_

Signature of Evaluator: \_\_\_\_\_ Date: \_\_\_\_\_

Signature of Evaluator's Supervisor: \_\_\_\_\_ Date: \_\_\_\_\_

**ACKNOWLEDGEMENT BY EMPLOYEE**

My signature acknowledges only that my supervisor(s) met with me to review my performance and that I have received a copy of this form. My signature does not signify approval or disapproval of the performance management review form.

\_\_\_\_\_  
Employee's Signature Date \_\_\_\_\_

**Optional Comments (check all that apply):**

- I agree with this Performance Management review.
- I disagree with this Performance Management review.
- I am attaching comments regarding this Performance Management review.

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## Guidance and Instructions on Use of Improvement/Development Plan Form

Employees must continually improve existing skills and develop new ones to ensure continued effectiveness. In this part of the discussion, employees and supervisors can define a specific course of action to:

enhance current skills, develop new skills, broaden knowledge, or improve a deficient area.

Development is a joint responsibility of employees and supervisors. Supervisors have the greatest responsibility to assist with development when it is required for an employee's current position. Employees are primarily responsible for development that advances their careers. The career development portion of this discussion provides an important opportunity for the supervisor to give an honest assessment of the employee's preparedness for desired career growth, as well as development the supervisor believes would help the employee in attaining his/her goals.

1. Use the Performance Management Review Form to identify the employee's performance improvement and/or professional development needs. Select up to 4 specific competencies or behaviors/skills to focus on during the specified time period.
2. For each competency or behavior/skill, discuss the following with the employee:
  - a. The specific concern/issue regarding this competency/behavior
  - b. What already works and is being done well in that area (e.g. the starting point)
  - c. Specifics of what can be done better? More often? Differently?
  - d. The objective in further developing this competency or improving this behavior
  - e. The benefits of strengthening this competency and the impact of not doing so
  - f. The resources and support needed
  - g. The most optimal developmental activities
3. Complete the Improvement/Development Plan form.

**Recommended Development Activities-Consider the following:** What type of learning works best for you? What type of activity has been effective for you before and why? What are the benefits of choosing this activity? How will this activity help you achieve positive results? What is the most cost effective activity that will still achieve benefits?

1. Committee or team work
2. Community involvement/outreach
3. Conferences, workshops, or educational course
4. Mentoring or individual coaching/counseling by supervisor
5. Individual coaching/counseling by someone besides supervisor
6. Individual initiatives proposed by employee him/herself
7. Network groups (internal, associations, list-serve groups, etc.)
8. Self directed instruction (e.g. readings, on-line courses, and reflective thinking or writing)
9. Special projects/assignments
10. Cross training on lateral or higher level job duties.

Once the supervisor and the employee have identified skill areas requiring development, the supervisor can refer the employee to the Human Resource-Organization Excellence Office (7-4999) for more information about various resources available on campus or in the surrounding area.

Also relevant under this agenda item is the adequacy of the employee's development and response to changing work demands. Clear feedback on this question is crucial to both the employee's and EMU's success. Failure to meet this challenge can result in skill obsolescence and organizational mediocrity. This discussion might focus on:

- What growth the employee has accomplished and how that has supported the unit's needs.
- The unit's long-term plans and how the employee is expected to contribute to these goals, along with related development needs.
- How well the employee responds to change.