

*The University of Tulsa - Vision of Excellence*  
**Performance Evaluation Program**  
*For Supervisory Personnel*

Employees Name: \_\_\_\_\_  
 Title: \_\_\_\_\_  
 Department: \_\_\_\_\_  
 Date: \_\_\_\_\_  
 Name of Evaluator: \_\_\_\_\_

**RATING SCALE DEFINITIONS**

**Outstanding (O):** Reserved for those few individuals who strive for excellence and who consistently achieve the highest levels of performance in the job, working in an independent, self-directed manner, and consistently attains highly successful and/or exemplary results. The individual clearly, specifically, and consistently exceeds major expectations of the position; quality and timeliness of results occur despite both challenging objectives and circumstances; individual is regularly sought out for counsel because of demonstrated knowledge and accomplishments; demonstrates exceptional interpersonal communication skills; individual exhibits superlative creativity, initiative and drive; and achieves results well beyond the scope of the position.

**Exceeds Expectations (EE):** Indicates the individual: takes initiative and is proactive in performing the job, especially in the most difficult and demanding areas of performance; fully and consistently attains levels of success over and above the standards of performance expected for all responsibilities; consistently attains objectives in a timely manner; errors are few and not repeated; proficient in knowledge requirements of the position; effective interpersonal and communication skills; and may occasionally demonstrate outstanding performance.

**Meets Expectations (ME):** Indicates the individual normally performs at an acceptable level on a consistent basis. This is the level of expected work performance meets the required expectations of the position; generally completes objectives/projects in a timely and accurate manner; and may occasionally demonstrate performance that exceeds expectations.

**Needs Improvement (NI):** Significant and immediate performance improvement is needed. Performance rated at this level is below acceptable performance requirements. This level should be considered temporary and not allowed to persist. *An employee with an overall rating of "Needs Improvement" must receive a follow-up performance review in 60 days.* As part of the performance evaluation the supervisor will provide a written description of those items the employee must do in order to improve the rating. Additionally, the supervisor will meet with the employee at least every other week during the 60 day period to provide feedback regarding progress or lack thereof. The individual should not receive any merit increase.

**KEY PERFORMANCE AREAS**

|  | RATINGS |    |    |    |
|--|---------|----|----|----|
|  | O       | EE | ME | NI |
| <b>CUSTOMER SERVICE</b>  |         |    |    |    |
| Communicates effectively with customers (verbal and written)     |         |    |    |    |
| Responds positively to customer needs                            |         |    |    |    |
| Handles complaints/confrontations with tact and diplomacy        |         |    |    |    |
| <b>COMMITMENT</b>  |         |    |    |    |
| Dependability  |         |    |    |    |
| Willingness to adapt to change/take on new responsibilities      |         |    |    |    |
| Motivation/Attitude toward job and TU                            |         |    |    |    |
| <b>TEAMWORK</b>  |         |    |    |    |
| Works well with others   |         |    |    |    |
| Flexible/Open-minded   |         |    |    |    |
| Focuses on the university's vision as well as departmental goals |         |    |    |    |
| <b>QUALITY OF WORK</b>   |         |    |    |    |
| Consistently produces work of high quality                       |         |    |    |    |
| Thoroughly follows departmental standards and procedures         |         |    |    |    |
| Attentive to detail and accuracy                                 |         |    |    |    |
| <b>PRODUCTIVITY</b>  |         |    |    |    |
| Produces expected quantity of work                               |         |    |    |    |
| Works with minimum supervision/prioritizes tasks                 |         |    |    |    |
| Adheres to deadlines/schedules                                   |         |    |    |    |

|   | RATINGS |    |    |    |
|---|---------|----|----|----|
|   | O       | EE | ME | NI |
| <b>JOB KNOWLEDGE</b>  |         |    |    |    |
| Applies technical knowledge to job requirements   |         |    |    |    |
| Understands and defines problems clearly  |         |    |    |    |
| Weighs alternatives before making decisions   |         |    |    |    |
| <b>LEADERSHIP</b>   |         |    |    |    |
| Communication to staff  |         |    |    |    |
| Staff Development / Empowerment   |         |    |    |    |
| Planning / Organizing / Delegating  |         |    |    |    |
| Diversity Management (Affirmative Action efforts toward recruiting, training & development, etc.) |         |    |    |    |
| Fiscal / Budgetary Responsibilities   |         |    |    |    |
| <b>NCAA (IF APPLICABLE)</b>   |         |    |    |    |
| Regulations and Rule Compliance   |         |    |    |    |

**ACCOMPLISHMENTS/RESULTS**

Please list the strengths and goals/accomplishments of the employee's performances for the last year. Remember to add any training and development programs for the last year. (Additional pages may be attached.)

Has the employee participated in the Quality Service with a Plus training program?  Yes  No  
 If no, please explain.

**PERFORMANCE SUMMARY**

Considering the individual's strengths, accomplishments, as well as areas needing improvement, please rate and describe the individual's overall level of performance. You may also provide specific comments relating to the Key Performance Areas.

|                                   | RATINGS |    |    |    |
|-----------------------------------|---------|----|----|----|
|                                   | O       | EE | ME | NI |
| <b>OVERALL PERFORMANCE RATING</b> |         |    |    |    |

Comments: (Additional pages may be attached.)

**PERFORMANCE PLAN**

Develop an action plan for the individual employee. This action plan should include a description of long-term and specific goals for next year. Also, examine ways in which the employee can contribute to the University's Vision of Excellence mission. If practical, deadlines should be set for the majority of these goals. (Additional pages may be attached.)

**SIGNATURES**

Signature indicates that the evaluation has been discussed and does not necessarily signify concurrence. A response to this review may be made on a separate sheet and attached or forwarded to the Office of Human Resources.

|  |             |
|--|-------------|
| <i>Employee</i>                        | <i>Date</i> |
| <i>Evaluator/Supervisor</i>            | <i>Date</i> |
| <i>Dean/Director/or Vice President</i> | <i>Date</i> |