

WHITTIER COLLEGE (WC) & WHITTIER LAW SCHOOL (WLS) ADMINISTRATIVE PERFORMANCE APPRAISAL FORM

Employee Name & Employee ID #: <div style="background-color: gray; width: 50px; height: 15px; margin-top: 5px;"></div>	Position Title: <div style="background-color: gray; width: 50px; height: 15px; margin-top: 5px;"></div>
Department: <div style="background-color: gray; width: 50px; height: 15px; margin-top: 5px;"></div>	
Supervisor's Name: <div style="background-color: gray; width: 50px; height: 15px; margin-top: 5px;"></div>	Supervisor Position Title: <div style="background-color: gray; width: 50px; height: 15px; margin-top: 5px;"></div>
Executive's Name: <div style="background-color: gray; width: 50px; height: 15px; margin-top: 5px;"></div>	Review Period: JULY 1, 2011 TO JUNE 30, 2012 ANNUAL EVALUATION

INSTRUCTIONS

If downloading the General Performance Appraisal Form from the WC Website please save the form as a Word document on your computer network drive prior to completing the form. For grammar and spelling check, you should place the selected text in a separate Word document, spell check, and then cut and paste the text into the form field.

Please review and be ready to discuss the WC's or WLS's mission, vision, and core values as they relate to the Employee's job description. The **Supervisor** is encouraged to update the Employee's job description as necessary.

EXPECTATION CATEGORIES

- **Clearly Outstanding:** Employee performance **consistently exceeds** the standards and requirements of the position. The employee consistently demonstrates significant effort to achieve clearly outstanding results. Easily recognized as a top performer operating well above the standards set by peers in comparable situations. Supervisors are expected to use this rating with great discretion and to justify it with supporting comments.

- **Exceeds Expectations:** Easily recognized as a solid, effective, and **sometimes an exceptional performer** who operates at the high level of expertise and experience necessary to set standards for excellence and professionalism. Fully proficient and dependable performance in a wide variety of work. Supervisor expected to provide supporting comments.

- **Meets Expectations:** Employee performance meets most standards and requirements of the position. The employee demonstrates efforts to achieve satisfactory results. Supervisor may suggest recommendations and goals in order for the employee to achieve a higher rating for next fiscal year's performance evaluation period.

- **Improvement Needed:** Employee performance is often below the standards and requirements of the position. The employee needs to demonstrate significant effort to bring overall work performance up to an acceptable standard. Supervisors are expected to use this rating with serious discretion and to justify it with supporting comments.

Attach a **Plan for Improvement to this Performance Form for any employee with an Overall Rating of **"Improvement Needed."***

Employee Name: [REDACTED]

Position Title: [REDACTED]

PERFORMANCE FACTORS

- The **Supervisor and Employee should meet together**, referring to and updating the Employee's job description as necessary, in order to assist them in determining the relevancy of the following performance factors. Together they should specify behavioral examples of the Employee's demonstration of each performance factor and discuss how each factor relates to the Employee's major job responsibility areas.
- The Supervisor is expected to discuss how they will **coach, monitor, and recognize** the Employee's efforts in support of each performance factor. Additionally supervisors should review and assess with the employee whether the goals agreed upon during the previous performance appraisal process were accomplished during Fiscal Year 2011-2012.
- Please note that **definitions of factors** describe WC's or WLS's standard for an evaluation rating of Meets Expectations.

<p>JOB KNOWLEDGE & SKILLS:</p> <ul style="list-style-type: none"> • Utilizes skills and knowledge to perform assigned work. • Employs all available resources to perform job duties. • Takes initiative to build upon knowledge and offers ideas for improvement. • Demonstrates a thorough understanding of the WC's or WLS's policies, organization, programs, collections, exhibits and trends in the field as they affect major job responsibility areas. 	<p>Expectations?</p> <p><input type="checkbox"/> Clearly Outstanding</p> <p><input type="checkbox"/> Exceeds Expectations</p> <p><input type="checkbox"/> Meets Expectations</p> <p><input type="checkbox"/> Improvement Needed</p>
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COMMENTS / EXAMPLES:

From Employee: [REDACTED]

From Supervisor: [REDACTED]

Agreed Upon Goal(s) for Current Fiscal Year: [REDACTED]

<p>QUALITY:</p> <ul style="list-style-type: none"> • Continuously demonstrates the highest levels of accuracy, creativity, follow-through, and attention to detail. • Displays completeness and thoroughness in work assignments. • Consistently meets deadlines for time sensitive work. • Takes initiative when necessary to achieve excellence and the highest quality work product. 	<p>Expectations?</p> <p><input type="checkbox"/> Clearly Outstanding</p> <p><input type="checkbox"/> Exceeds Expectations</p> <p><input type="checkbox"/> Meets Expectations</p> <p><input type="checkbox"/> Improvement Needed</p>
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COMMENTS/ EXAMPLES:

From Employee: [REDACTED]

From Supervisor: [REDACTED]

Agreed Upon Goal(s) for Current Fiscal Year: [REDACTED]

Employee Name: Position Title: 	
PRODUCTIVITY: <ul style="list-style-type: none"> Utilizes time and resources to produce an acceptable amount of work during normal work hours and commensurate with job expectations. Employee is dependable, demonstrates creativity, takes initiative and works within established time frames. Delivers expected or targeted outcomes and results efficiently and effectively. 	Expectations? <ul style="list-style-type: none"> <input type="checkbox"/> Clearly Outstanding <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Improvement Needed
COMMENTS / EXAMPLES: From Employee: From Supervisor: Agreed Upon Goal(s) for Current Fiscal Year: 	
PROBLEM SOLVING, JUDGMENT, ACCOUNTABILITY & ETHICS: <ul style="list-style-type: none"> Identifies, evaluates, and solves problems effectively. Exercises sound judgment when making decisions. Performs thorough and precise gathering and analysis of relevant information and situational facts. Reviews and analyzes the outcomes of various actions prior to acting in order to make appropriate choices. Gives credit and respect for others' ideas and successes and supports flexibility and change. Accepts and learns from constructive criticism. Shares necessary information and exercises discretion with confidential information Demonstrates and accepts overall responsibility for major work assignments, team management and collaborations as they relate to WC's or WLS's departmental and individual objectives. Employee's conduct is fair, honest and consistent with highest ethical standards of the institution and the field. 	Expectations? <ul style="list-style-type: none"> <input type="checkbox"/> Clearly Outstanding <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Improvement Needed
COMMENTS / EXAMPLES: From Employee: From Supervisor: Agreed Upon Goal(s) for Current Fiscal Year: 	

Employee Name: Position Title: 	
ORGANIZATION & COMMUNICATION SKILLS: <ul style="list-style-type: none"> Performs tasks in an organized manner, and establishes priorities. Delegates work to others appropriately. Is prepared for meetings and presentations and achieves established goals Communicates in a professional manner; shares information and ideas clearly, both orally and in writing. Is an effective listener in all interpersonal relationships with external audiences and internal staff. 	Expectations? <ul style="list-style-type: none"> <input type="checkbox"/> Clearly Outstanding <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Improvement Needed
COMMENTS / EXAMPLES: From Employee: From Supervisor: Agreed Upon Goal(s) for Current Fiscal Year: 	
INTERPERSONAL SKILLS & SERVICE ORIENTATION: <ul style="list-style-type: none"> Works with other employees and WC or WLS service providers in a positive and cooperative team spirit to achieve common objectives. Remains responsive, flexible and open minded at all times when working with others in individual and/or in teams. Builds and fosters relationships by understanding, anticipating, and responding promptly to others needs and expectations. Advances the WC's or WLS's mission to serve the students; is service oriented and professional when interacting with students. Works will with others in a respectful and tactful manner. Encourages and gives constructive criticism while actively working to identify and discourage destructive criticism and behavior. 	Expectations? <ul style="list-style-type: none"> <input type="checkbox"/> Clearly Outstanding <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Improvement Needed
COMMENTS / EXAMPLES: From Employee: From Supervisor: Agreed Upon Goal(s) for Current Fiscal Year: 	

Employee Name: [REDACTED]	Position Title: [REDACTED]
SUPERVISORY EVALUATION SECTION	
In addition to Performance Appraisal Form sections above, please complete the following skill categories for all employees in supervisory positions.	
SUPERVISORY SKILLS: <ul style="list-style-type: none"> Assesses direct reports' abilities to make required staff/personnel decisions; to plan and assign duties; to coordinate, direct and control work for assigned area of responsibility effectively; and has employees meeting their maximum potential in their positions. Promotes employee relations, fosters a comfortable work environment and fairly and accurately evaluates employee performance; creates enthusiasm and motivates employees to gain loyalty, respect and support from his/her subordinates. Encourages dialogue, accepts constructive criticism and develops abilities and skills of direct reports through training, guidance, support, and constructive direction; avoiding micro-managing subordinates. Consistently provides departmental staff with clear and actionable performance feedback in a timely manner; handles disciplinary situations promptly and effectively. Flexibly adjusts administrative techniques and styles when managing employees with different skills, perspectives, and abilities. Delegates duties and authority effectively. Is reasonably available to employees and colleagues during working hours. 	Expectations? <ul style="list-style-type: none"> <input type="checkbox"/> Clearly Outstanding <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Improvement Needed
COMMENTS / EXAMPLES:	
From Employee: [REDACTED]	
From Supervisor: [REDACTED]	
Agreed Upon Goal(s) for Current Fiscal Year: [REDACTED]	

Employee Name: [REDACTED]	Position Title: [REDACTED]
LEADERSHIP SKILLS: <ul style="list-style-type: none"> • Is decisive and action-oriented, thinks strategically, and serves as a positive role model for other employees, showing a commitment to the institution and its priorities. • Builds effective working relationships at all levels. • Recognizes and works with WC or WLS staff to achieve the long term program objectives. • Encourages and gives constructive criticism while actively working to identify and discourage destructive employee criticism and behavior; addresses and identifies conflicts and resolves appropriately. • Executes directions and plans received from the next higher administrative unit independent of personal likes/dislikes. • Accepts criticism and feedback from management with minimum defensiveness. • Selects and promotes the best employees for WC or WLS. • Employs broad institutional goals in setting priorities; sets goals and evaluates effectiveness of programs. • Models excellence in behavior and performance as expected from peers, staff, and management; demonstrates integrity. 	Expectations? <ul style="list-style-type: none"> <input type="checkbox"/> Clearly Outstanding <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Improvement Needed
COMMENTS / EXAMPLES: From Employee: [REDACTED] From Supervisor: [REDACTED] Agreed Upon Goal(s) for Current Fiscal Year: [REDACTED]	

RESOURCE AND FINANCIAL MANAGEMENT: <ul style="list-style-type: none"> • Actively participates in the budget planning process, prepares and monitors costs to avoid cost overruns and manages resources (employees and finances) appropriately to maximize efficiency and productivity to further WC's or WLS's vision and program objectives. • Manages and demonstrates responsibility for WC's or WLS's assets, such as proprietary information, technology, equipment, budget, human resources, expenditures, and space in order to ensure the greatest organizational benefit and meet established program objectives. • Observes and follows WC safety and emergency procedures. 	Expectations? <ul style="list-style-type: none"> <input type="checkbox"/> Clearly Outstanding <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Improvement Needed
COMMENTS / EXAMPLES: From Employee: [REDACTED] From Supervisor: [REDACTED] Agreed Upon Goal(s) for Current Fiscal Year: [REDACTED]	

Employee Name: [Redacted]

Position Title: [Redacted]

OVERALL PERFORMANCE LEVEL:

- Clearly Outstanding
- Exceeds Expectations
- Meets Expectations
- Improvement Needed

COMMENTS FOR THE NEXT REVIEW PERIOD

Supervisor should add other action plans, ideas, recommendations, acknowledgements or comments relevant to the next review period that were or were not previously discussed. Additional written comments relating to this evaluation may also be attached on a separate sheet.

[Redacted]

OVERALL EMPLOYEE COMMENTS

Employee should add other action plans, ideas, recommendations, acknowledgements or comments relevant to this evaluation or the next review period that were or were not previously discussed. Additional written comments relating to this evaluation may also be attached on a separate sheet.

[Redacted]

I acknowledge that I have read and discussed this performance appraisal with my Supervisor.

My signature does not necessarily indicate agreement with the contents or overall evaluation by my Supervisor, but does acknowledge that I have been advised of my performance appraisal.

SIGNATURES

Supervisor's Signature Date

Department Head's Signature Date

Executive's Signature Date

Director of Human Resources Signature Date

Employee's Signature Date