**MEMO**

**To:**

**From:** Marleen Jones, Assistant Director of Employee Relations

**Date:**

**Subject:** Special or Annual Review

(Please read the below carefully before completing and call the Human Resources Department at extension 7163, if there are any questions)

 Formal performance appraisals need to be completed for all staff employees on an annual basis. The appraisal period will cover January 1 through December 31. Plan to meet with your staff during the months of January and February.

 If a new employee’s initial review has been conducted within the past six months, prior to the annual cycle (January to February), there is no need to automatically conduct another review during the annual review period unless the employee and/or supervisor requests it.

**STEPS TO FOLLOW:**

1. Carefully review the employee’s work performance from January 1 through December 31 based on the position (job) requirements.
2. Based on your review, mark the level which best describes performance during the review period. If the performance factor is not applicable to the position or if there has not been sufficient opportunity to gauge performance, please indicate “NA” (Not Applicable).
3. Any mark above or below “Achieved Standards/Characteristic” must be explained in the comments section.(For descriptive DEFINITIONS of the five levels, refer to the KEY on page 2).
4. Complete the Goals and Summary sections on page 7. Include related timelines for expected improvement or completion of goals.
5. Discuss as necessary with your immediate supervisor and/or Human Resources.
6. Prior to meeting with the employee have the employee review their job description and a blank copy of the performance review.
7. Schedule a time to meet with the employee to discuss the review. Review any needed changes to the job description.
8. Have the employee sign the review and add any comments. After both of you have signed the
review, retain a copy for your files and give one copy to the employee. Please email any revised Job descriptions to Human Resources at HR@oru.edu. **Send the original signed document or email the signed document to Human Resources for the employee’s file.**

Please mark the level which best describes performance during the review period. If the performance factor is not applicable to the position or if there has not been sufficient opportunity to gauge performance, please indicate “NA” (Not Applicable)**.** Any mark above or below “Achieved Standards/Characteristic” must be explained in the comments section.(For descriptive **DEFINITIONS** of the five levels, refer to the **KEY** below.)

**Key:**

**Greatly Exceeded Standards/Exceptionally Characteristic**

This rating should reflect the performance of a truly outstanding performer, one whose behavior, as regards this topic, is exemplary. This rating should be reserved for those who consistently perform at a level you could describe as “the best of the best.”

**Exceeded Standards/Very Characteristic**

On a regular basis this individual’s performance more than lives up to expectations for getting the job done in regard to the attribute in question. This person behaves in a way that inspires confidence that they will represent themselves and the organization with distinction.

**Achieved Standards/Characteristic**

If you compare this person’s performance with the normal, expected standard of acceptable achievement, you would find them fully competent and you would be pleased that this individual is “pulling their share of the load” and making a solid contribution to the workplace. **NOTE:** Most employees who meet standards fully will be in this column.

**Marginally Achieved Standards/Somewhat Characteristic**

While the person performs up to the standard, expected level for this trait frequently, you could not say that this level is achieved consistently and dependably. Their periodic attainment of the standard performance level indicates that, with proper resources, and by applying themselves to the challenge, they are capable of achieving that level of performance on a more routine basis.

**Standards Not Achieved/Not Characteristic**

In regard to the performance factor in question (or the overall rating), this individual is consistently performing below the level that is expected and acceptable. Attention needs to be paid to raising the performance level, with the supervisor offering specific guidance and support in this area, and with the individual employee assuming responsibility for making a concerted effort at adequate improvement.

**N/A Not Applicable**

 **Oral Roberts University**

**Employee Performance Review**

|  |  |  |
| --- | --- | --- |
| **Name:**  | **Position:**  | **Dept.:** |
| **Supervisor:**  | **Date of Rating:**   | **Company:** ORU |

**Performance Factors** **Performance Ratings**  **Reviewer Comments**

|  |  |  |
| --- | --- | --- |
| For descriptive **DEFINITIONS** of the five levels, refer to the **KEY** on page 2. | 1. Greatly Exceeded Standards/ Exceptionally Characteristic;
2. Exceeded Standards/Very Characteristic
3. Achieved Standards/Characteristic
4. Marginally Achieved Standards /Somewhat Characteristic
5. Standards Not Achieved/Not Characteristic
6. N/A Not Applicable
 | **Reviewer:** Comment where necessary to more accurately or fully describe the indicated level of performance.**Any mark above or below “Achieved Standards/Characteristic” must be explained in the comments section.** |
| 1. Maintains regular attendance and is depended upon to be available for work
 | Choose an item. |       |
| 1. Prompt in reporting for work and in leaving; remains in assigned work area as required
 | Choose an item. |       |
| 1. Attends chapel at least once per week during the academic year
 | Choose an item. |       |
| 1. Completes assignments in a thorough, accurate, and timely manner; produces a high quality of work in a day
 | Choose an item. |       |
| 1. Meets deadline commitments; reliable and dependable
 | Choose an item. |       |
| 1. Handles multiple responsibilities in an effective manner
 | Choose an item. |       |
| 1. Has mastery of all the skills and knowledge of the job as expected by supervisor at this point and time
 | Choose an item. |       |
| 1. Is appropriately proficient in the use of computers and other technological resources
 | Choose an item. |       |
| 1. Is able to work with a minimum of supervision; has initiative; self-motivated to begin work or proceed with work to completion
 | Choose an item. |       |
| 1. Understands applicable organizational, departmental work procedures and rules, and follows them
 | Choose an item. |       |
| 1. Is teachable; understands instructions and explanations and learns quickly
 | Choose an item. |       |
| 1. Maintains confidentiality of information
 | Choose an item. |       |
| 1. Has creative ideas; thinks of new approaches to work problems, processes or procedures
 | Choose an item. |       |
| 1. Is able to "think through" normal work problems and solve them independently; yet, involves others when necessary or appropriate
 | Choose an item. |       |
| 1. Accepts responsibilities even when they are tough or unpleasant
 | Choose an item. |       |
| 1. Adapts well to new or unusual situations; is flexible
 | Choose an item. |       |
| 1. Is able to withstand pressure and remain calm in difficult situations
 | Choose an item. |       |
| 1. Has the ability to communicate clearly and concisely; to give feedback to others in an open and respectful manner
 | Choose an item. |       |
| 1. Has the ability to accept constructive feedback and takes responsibility for mistakes without reacting defensively
 | Choose an item. |       |
| 1. Develops effective working relationships with employees in other departments
 | Choose an item. |       |
| 1. Works well with fellow employees; is collaborative and a team player
 | Choose an item. |       |
| 1. Shows respect to all persons
 | Choose an item. |       |
| 1. Provides quality customer service to students, parents, fellow employees, and guests
 | Choose an item. |       |
| 1. Demonstrates awareness and use of safe work practices
 | Choose an item. |       |
| 1. Click here to enter text.
 | Choose an item. |       |
| 1. Click here to enter text.
 | Choose an item. |       |

**If employee has no supervisory or leadership responsibilities at this time, please move to Core Values Assessment on page 6.**

**Continued on next page.**

**Additional Performance Factors**

**for employees with *supervisory/***

***leadership*responsibilities** **Performance Ratings**  **Reviewer Comments**

|  |  |  |
| --- | --- | --- |
| For descriptive **DEFINITIONS** of the five levels, refer to the **KEY** on page 2. | 1. Greatly Exceeded Standards/ Exceptionally Characteristic;
2. Exceeded Standards/Very Characteristic
3. Achieved Standards /Characteristic
4. Marginally Achieved Standards /Somewhat Characteristic
5. Standards Not Achieved/Not Characteristic
6. N/A Not Applicable
 | **Reviewer:** Comment where necessary to more accurately or fully describe the indicated level of performance. **Any mark above or below “Achieved Standards/Characteristic” must be explained in the comments section** |
| 1. Effectively coaches and develops others to build skills and capabilities; establishes challenging goals; promotes innovation and team effort
 | Choose an item.  |       |
| 1. Completes evaluations in a fair, accurate, and timely manner
 | Choose an item. |       |
| 1. Conveys clear expectations for assignments
 | Choose an item. |       |
| 1. Provides adequate and on-going training opportunities for staff
 | Choose an item. |       |
| 1. Anticipates problems and takes appropriate actions to solve them
 | Choose an item. |       |
| 1. Effectively plans, organizes and efficiently handles activities and eliminates unnecessary activities
 | Choose an item. |       |
| 1. Effectively establishes appropriate reporting and control procedures
 | Choose an item. |       |
| 1. Effectively operates department at lowest cost staying within established budgets
 | Choose an item. |       |
| 1. Develops effective plans that balance long term goals and immediate priorities; communicates a clear purpose for the organization and aligns staff roles to accomplish department priorities.
 | Choose an item. |       |
|  | Choose an item. |       |
|  | Choose an item. |       |

**Continued on next page.**

**CORE VALUES ASSESSMENT Check Appropriate Box (3 High to 1 Low)**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  | **3** | **2** | **1** |
| **Wholeness** | Committed to university mission, department objectives, self-improvement, personal, physical, mental and spiritual well-being |[ ] [ ] [ ]
| **Integrity** | Follows university policies, standards and lifestyle expectations; is honest, consistent, just and fair; is willing to be held accountable |[ ] [ ] [ ]
| **Servanthood** | Performs work with an attitude of giving self to the needs and service of others; shows regard for others when resolving concerns and problems; is a good steward of university resources (time, equipment, supplies, etc.) |[ ] [ ] [ ]
| **Excellence** | Performs in a manner that adds value to assignment; is innovative and creative; seeks efficiencies and improvements |[ ] [ ] [ ]
| **Respect** | Considerate of others in conduct, communication, and decisions; actively supports ORU’s globalization initiatives; values the uniquely diverse qualities of the ORU community  |[ ] [ ] [ ]

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**OVERALL RATING,** considering [ ]  Greatly Exceeded Standards

all performance factors and their [ ]  Exceeded Standards

relative importance to the job: [ ]  Achieved Standards

(Please refer to the key on page 2).

 [ ]  Marginally Achieved Standards—Next review will be on Click here to enter text.

[ ]  Standards Not Achieved—Next review will be on Click here to enter text.

 **GOALS**: List work-related goal(s) or objectives to be achieved during the NEXT review period.

1.

2.

3.

**SUMMARY:** Include a specific statement about the employee’s level of performance.

**Summary Remarks:**

Click here to enter text.

Click here to enter text.

Click here to enter text.

Click here to enter text.

Your signature does not signify your agreement with the performance review; it simply means the review has been discussed with you.

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Employee Signature Date Supervisor and/or Dept. Head Signature Date

**Employee Comments (if any)**: (To be completed within 48 hours. Attach more paper if needed.)

***Send original to Human Resources. Employee and Supervisor keep copies.***