



Department of Administrative Services  
Facilities Division

**PERFORMANCE APPRAISAL GUIDE**

**GUIDE TO PERFORMANCE EVALUATIONS  
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## GUIDE TO PERFORMANCE EVALUATIONS

The purpose of supervision and evaluation is to ensure the effectiveness of each Facilities Division employee. The current performance evaluation reports have been designed to assess the employee's achievements and the degree to which the performance requirements of the position have been met. The evaluation forms are used to document both satisfactory and not satisfactory job performance.

This guide is intended for information purposes only. It is not intended to change or create any contractual right in favor of the employee or the division. The division's regulations, policies, procedures, work site rules, and benefits are continually evolving, and therefore, this guide does not contain all of the information which may need to be known during the course of business.

### A. OBJECTIVES OF EMPLOYEE EVALUATION

1. To provide an accurate and current assessment of an employee's work performance in relation to job expectations.
2. To develop and to maximize the performance and growth potential of the employee.
3. To collect information which will aid the employee's supervisor and the division in reaching effective and fair decisions regarding employee utilization within the section, development, training and retention.

### B. EVALUATION PROCESS FOR TRIAL SERVICE

1. A trial service period of six months will be served by full-time represented and non-management employees new to the agency, and by employees, who are promoted, transferred, or take a voluntary demotion to a position in which they have never served trial service. Part-time employees will serve a trial service period of 1040 hours. Trial service represented employees are to be evaluated a minimum of three times during the trial service period: at the end of each of the first month, third month and at the end of the sixth month. Management Service Employees will be evaluated a minimum of six times during the trial service period, at one, three, five, seven, nine and twelve months. The manager has the option to evaluate at the end of each month (six times for represented employees and twelve times for management service employees).

An evaluation period can be extended at the end of the six-month trial service period for a represented employee after consultation with the Administrator and DAS Employee Services if the employee's performance needs additional review. The trial service period may be extended in instances where the trial service employee has been on cumulative leave for fifteen (15) days or more and then only by the number of days the employee was on such leave. The trial service may be extended up to 12 months (for represented employees) based upon specific circumstances which may effect the time needed to demonstrate competency, (i.e. the complexity of the job, the length of time required to effectively perform the work, and the length of the agency's initial training program), per HRSD policy 40-064-01. Management service Principle Executive Manager Series new hires will serve a 12 month trial service period per HRSD Permanent Rule 105-040-0065.

2. The final trial service evaluation is the last and most important step in the selection of quality employees. Supervisors should have confidence that the trial service employee fully meets division performance standards before the employee attains regular status. A trial service employee should not be granted post-probationary (regular) status if any performance standard is rated as "Needs Improvement" or "Unsatisfactory."

A trial service employee who has not attained regular status with the division may be dismissed at any time during trial service without appeal. Serious consideration should be given to consequences of granting regular status to an employee to be retained in a position for which the employee is poorly suited. Likewise, when in the judgment of the Appointing Authority, performance has been adequate to clearly demonstrate the competence and fitness of the trial service employee, the Appointing Authority may at any time appoint the employee to regular status.

In deciding whether a trial service employee should be terminated or allowed regular status, the supervisor must contemplate whether the employee would be a sound, long-term asset to the division. Action which is to be taken with a regular-status employee who is serving a trial service period in a new position and who is rated "Unsatisfactory" and/or who is recommended for a demotion will be in accordance with DAS and HRSD policy.

### C. EMPLOYEE PERFORMANCE STANDARDS ON TRIAL SERVICE EVALUATIONS

1. **"U" UNSATISFACTORY:** Denotes serious skill deficiencies or job-related behavior that is incompatible with a recommendation for or reasonable expectation of continued employment. Any area considered "Unsatisfactory" may result in removal from trial service. A trial service status employee may not be granted "regular status" with an overall rating of "Unsatisfactory" or with any performance factors rated as "Unsatisfactory".
2. **"N" NEEDS IMPROVEMENT:** Denotes skill deficiencies or job-related behavior requiring correction in anticipation that the employee can and will take appropriate corrective action and will soon demonstrate satisfactory performance.
3. **"S" SATISFACTORY:** Denotes average, acceptable performance of the duties of the position.
4. **"A" ABOVE AVERAGE:** Denotes performance above expectations demonstrated in a consistent, competent, and above average manner.

## D. MONITORING PERFORMANCE

### 1. FIRST TWO MONTHLY EVALUATIONS – INITIAL TRIAL SERVICE EMPLOYEES

This evaluation monitors performance accomplishments and standards at bi-monthly intervals during the first six months of the trial service period. The supervising manager makes appropriate marks under the appropriate month to indicate current performance levels on the factors listed. The second page of the Trial Service Evaluation is for monthly comments regarding the employee's performance. This is where you will discuss the employee's job strengths and specific performance, specific goals or required improvement programs to be undertaken. This area is also used to note employee's specific work performance deficiencies or job behavior requiring improvement or correction, and recommendations the employee is required to follow to improve these areas.

- a. Misconceptions of job duties or expectations should be carefully explained to assure a mutual understanding between the employee and supervisor. Specific suggestions or directions for acceptable performance should be outlined, since compliance is a condition for continued employment.

### 2. SIXTH MONTH EVALUATION – INITIAL TRIAL SERVICE EMPLOYEES

- b. This recommendation is made at the end of the sixth month. If the overall rating is satisfactory, this will result in achievement of regular status for the employee. An employee who serves the trial service period in a satisfactory manner shall be classified as regular-status and will then be subject to discipline under: (See Article 20, Section 5 of SEIU Collective Bargaining Agreement and DAS HRSD policy 40-065-01).
- c. Disciplinary action may be taken at any time during the trial service period. Such action does not entitle the trial service employee to a hearing. A trial service employee who is rated as "Unsatisfactory" or "Needs Improvement" may be terminated at any time during the trial service period by the appointing authority.
- d. A regular-status employee who is promoted or transfers to a position with a different range of job skills shall serve a new probationary trial service period. If this employee is found to be unsatisfactory in the new position, he/she shall be reassigned, with regular status, to a position in the former agency, class, or comparable salary level, for which the employee is qualified and was previously rated as satisfactory and achieved regular status, unless charges are filed and he/she is discharged according to Article 29 of the SEIU Collective Bargaining Agreement and HRSD Policy 40-065-01, Section (2)(A).
- e. Upon a new assignment of the employee, the supervising manager should meet with the new employee to specify duties and responsibilities assigned to the position and the expected results and performance standards. It should be pointed out that these expectations will serve as the criteria by which the employee's performance will be measured according to the evaluation factors listed on the evaluation document. Close supervision and frequent feedback should be provided so that the employee learns the job and is aware of his/her progress (or lack of progress) during the trial service period.

### 3. TWELVE MONTH TRIAL SERVICE FOR MANAGEMENT SERVICE EMPLOYEES

- a. Management Service employees will serve a twelve month trial service per HRSD Policy 40.065.01. The Management Service and Unrepresented employees are evaluated on the Employee Evaluation - Trial Service form. DAS executive management has chosen to have all managers serve a trial service evaluation period of one year to assure that 40.065.01 (1) (b) is considered.

## EMPLOYEE EVALUATION – TRIAL SERVICE DEPARTMENT OF ADMINISTRATIVE SERVICES

<b>NAME</b>	<b>CLASS</b>	<b>DATE EMPLOYED</b>
<b>SUPERVISOR</b>	<b>CREW NUMBER</b>	<b>DATE TRIAL SERVICE ENDS</b>

<p><b>General Instructions:</b></p> <ol style="list-style-type: none"> <li>1) At the end of trial service the original will be sent to Personnel Service Section, in Salem, and a copy will be given to the employee.</li> <li>2) The employee must be evaluated monthly if Management Service or at minimum bi-monthly if classified employee, beginning 30 days from the employee’s initial hiring date.</li> </ol>	<p><b>Evaluation Instructions:</b></p> <ol style="list-style-type: none"> <li>1) In the boxes below, indicate your evaluation of this employee, using the following code letters:  <div style="margin-left: 20px;"> <b>A</b> – Above Average  <b>S</b> – Satisfactory  <b>N</b> – Needs Improvement  <b>U</b> – Unsatisfactory                 </div> </li> <li>2) Use reverse side of this form or separate sheet to document problems, improvements, or points discussed with employee. Any “U” rating must be documented.</li> </ol>
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	Month	1	2	3	4	5
<b>Date evaluated</b>						
<ul style="list-style-type: none"> <li>• Quantity of work being performed</li> <li>• Quality of work being performed</li> <li>• Attendance</li> <li>• Ability to work in harmony with co-workers and public</li> <li>• Learns assigned tasks readily</li> <li>• Understands and follows oral and/or written instructions</li> <li>• (If applicable) Willingness and physical ability to perform required duties under all types of conditions</li> <li>• Care and maintenance of equipment</li> </ul>		[ ]	[ ]	[ ]	[ ]	[ ]
		[ ]	[ ]	[ ]	[ ]	[ ]
		[ ]	[ ]	[ ]	[ ]	[ ]
		[ ]	[ ]	[ ]	[ ]	[ ]
		[ ]	[ ]	[ ]	[ ]	[ ]
		[ ]	[ ]	[ ]	[ ]	[ ]
		[ ]	[ ]	[ ]	[ ]	[ ]

*Note: By initialing this form the employee confirms only that the rating has been discussed and does not indicate agreement or disagreement*

	INITIAL EACH MONTH				
Supervisor					
Employee					

**IMMEDIATELY FOLLOWING THE 5<sup>TH</sup> MONTH RATING, MAKE YOUR RECOMMENDATION BELOW**

[ ] I recommend this employee be granted regular status      Supervisor’s Signature \_\_\_\_\_

[ ] I recommend this employee be terminated from trial service status      Date Signed \_\_\_\_\_

**SEE REVERSE SIDE FOR COMMENTS**



## E. ANNUAL PERFORMANCE APPRAISAL – Regular Status Employees

1. The annual performance appraisal for a regular-status employee provides an ideal opportunity for two-way communication in terms of the employee's performance. During the evaluation conference, discuss how the employee's work affects the continued operation of the section, division and ultimately the agency.

The experienced employee's ideas shared on their "Participation Form" on planning, developing better organization skills, work methods, and personal and professional goals should be solicited. Advice of such employees in matters of work simplification, manpower utilization, and procedural improvements should be considered.

2. In all instances of an employee evaluation, the employee's performance should be objectively evaluated in each area without allowing judgment in one area to unfairly influence another. For example, an employee may exceed standards in employee contacts but may require improvement in quantity of work. Examples to clarify and redirect employee efforts may be used as appropriate. To rate the employee, performance over the entire appraisal period (one year) should be considered. The evaluator should avoid being unduly influenced by events of the recent past (i.e. guard against the "halo" effect). Even though the evaluator may be rating a "very good" employee, almost all employees can improve in some area of performance. Example: You request that an employee move his desk to be closer to the team and the employee refuses repeatedly until you finally must make an ultimatum pointing out that the employee is committing insubordination. The employee finally acquiesced and moved as instructed. You realize that this employee's performance appraisal is due in a few weeks and you are still angry at this employee. It is very hard to not let the recent past affect your evaluation of this otherwise above average employee. It is very important to evaluate the employee on his performance, not unduly influenced by his stubbornness.
3. Where there are deficiencies which "Needs Improvement," written comments must accompany the evaluation, reflect the problem, and include directions as to how the employee should improve. The employee must be made aware that positive improvement is expected or disciplinary action may follow.
4. A performance appraisal may be completed for a regular-status employee at any time.
5. Performance appraisals may be appealed by classified employees under the grievance review process described in HRSD State Policy 70.0005.05 and SEIU Contract Article 20.
6. Represented employees may provide written comments within 60 days of the evaluation. Unrepresented employees who disagree with their appraisal may prepare written comments or rebuttal within 30 calendar days of receiving the appraisal. This rebuttal shall be attached to the appraisal form and becomes part of the official record.
7. A regular-status employee who receives an overall rating of "Not Satisfactory" or who has performance factors rated as "Unsatisfactory" is required to show immediate sustained improvement. (See HRSD Policy 40-065-01).

## F. ANNUAL APPRAISAL PROCEDURES

1. All markings and comments placed on the performance appraisal must be computer generated or typed. All signatures must be in blue ink and dated. Changes on the document or on attachments to the document must be initialed by the employee and supervising manager.
2. If space for comments is inadequate, dated and signed attachments may be made. All attachments to the evaluation must be signed by all parties and dated the same as the appraisal.
3. The division requires that a supervising manager sign each performance appraisal form as either the Rater or the Reviewer.
4. Due dates must be strictly observed. See flow chart page 29 for details.
5. All regular status employees must be evaluated at least once annually.
6. Unscheduled appraisal reports may be completed at any time for either regular-status or trial service employees as determined by the supervisory manager. If an unscheduled appraisal is completed, please be sure to note "Special Evaluation" at the top of the evaluation document.
7. All performance appraisal reports in the employee's personnel file (maintained by DAS Employee Services), are subject to review by a supervising manager whenever the employee is to be transferred or promoted.

## G. ANNUAL PERFORMANCE APPRAISAL RATING STANDARDS

These standards of performance are an overview of the factors each manager should consider when evaluating employees.

### FOR REGULAR CLASSIFIED AND UNREPRESENTED EMPLOYEES

1. **PRODUCTIVITY:** Summary of accomplishments measured against mutually agreed upon work objectives.
2. **PROGRAM KNOWLEDGE AND SKILLS:** Rated Excellent: Consistent high level of knowledge and skills; Good: Average level of skills and knowledge; Fair: Below average level of skills and knowledge; Need Improvement: Poor level of skills and knowledge.
3. **OTHER JOB RELATED SKILLS:** Are evaluated based on four criteria: Excellent; Good, Fair, and Need Improvement. The descriptions under each section: INITIATIVE, CREATIVITY; RELIABILITY, DEPENDABILITY; ORGANIZATION AND USE OF TIME; WRITTEN COMMUNICATION SKILLS; ORAL COMMUNICATION SKILLS are also grouped with four criteria that match the Excellent, Good, Fair and Poor levels for the Rater to choose from which most accurately describes the employee.
4. **EMPLOYEE DEVELOPMENT:** This section gives the supervisor an opportunity to note what the employee can do to improve his/her performance as well as what the supervisor can do to help the employee perform better. Check the overall performance rating, taking into account all factors and total performance for the full period of service being evaluated.

Comments are limited to performance strengths and/or improvements that are needed. This section is where the supervisor makes more specific or personal comments about the employee's knowledge and skills.

## H. APPRAISAL SUMMARY

Check one category that most describes the overall assessment of this employee's performance over the past year. Look carefully at the areas that were chosen in the sections "Other Job Related Skills" along with "Productivity" and "Program Knowledge" evaluations to most accurately describe this employee. Mark the criteria that this employee most closely matches overall. It helps to count how many Excellent, Good, Fair and Poor descriptions under the Other Job-Related Skills section and pick which level that this employee on average matches most often to combine with the other areas.

**Exceptional:** Total performance is well above normal standards for the position. Very few employees, if any, perform at this level in all categories. Only a truly exemplary employee should qualify for this overall rating.

**Above Expected:** Total performance is above average for the position. Few employees perform at this level in all categories.

**Expected:** Performance meets all standards, contribution is competent and acceptable. Most employees will be rated in this category.

**Below Expected:** Performance is less than expected and needs improvement in one or more areas. Total performance frequently or regularly falls short of normal acceptable standards. Deficiencies noted in "Productivity" and "Program Knowledge and Skills" sections must be improved. This evaluation rating indicates the supervisor's belief that the employee can and will make the necessary improvements in their performance. Performance, which may result in an overall summary evaluation of "Need Improvement", should have been brought to the employee's attention in writing prior to this final rating being made.

**Unsatisfactory:** Performance is clearly below expected and a Work Plan for development of improved performance is required soon.

## I. EMPLOYEE:

This section is for the employee to check whether he/she agrees with the overall appraisal; does not agree with the overall appraisal or the employee wishes to discuss the appraisal with the supervisor's manager. It is necessary to inform the employee that by signing this form it does not mean that the employee agrees with the content of the evaluation, the employee's signature just acknowledges that the employee has read the appraisal. The supervisor is required to tell the employee that the employee has the right to respond to the appraisal in writing and to specify a specific date the employee should respond by.

**Employee Comments:** This section gives the employee the opportunity to incorporate a brief comment into the appraisal if the employee wishes or a separate document submitted by the due date is acceptable if preferred.

## J. SIGNATURES:

The supervisor, the appointing authority and the employee will date and sign the report before it is submitted to DAS Employee Services. The employee's signature indicates that the employee has had an opportunity to read and discuss the report in a conference. If the employee refuses to sign the document for any reason, it should be explained that the signature does not imply or indicate employee agreement with the report, but only receipt of the report. The employee marks one of the four areas, 1) I agree with the overall evaluation; 2) I do not agree with the overall evaluation; 3) I wish to discuss the evaluation with a higher supervisor; or 4) I have read and reviewed the evaluation. It should be explained that the employee may respond in writing to the evaluation. If the employee still refuses to sign the report, a warning should be given that refusal to sign may result in disciplinary action. Refusal by an employee to sign an evaluation should be recorded on the report and then the report is to be forwarded to DAS Employee Services. The Supervisory Manager should contact Employee Services for guidance when an employee refuses to sign any document.

## K. EVALUATION FACTORS

1. **INITIATIVE, CREATIVITY:** The employee displays drive and energy in accomplishing tasks. Is the employee able to handle several tasks comfortably, and display enthusiasm for the job and the division? Does the employee display a positive attitude in completing work assignments and interacting with others? Does he/she take extra steps to ensure that tasks are well done? Does the employee complete tasks without prompting or directions from others? Does the employee seek additional tasks to be completed without directions and as appropriate?
2. **RELIABILITY, DEPENDABILITY:** Reports the employee's capability to be trusted and depended upon in a variety of circumstances. Are the supervisor and other employees able to rely on the employee for complete and accurate work within allowable timelines?
3. **ORGANIZATION AND USE OF TIME:** Reports the method(s) in which an employee approaches assigned duties and sets realistic timeframes to complete time sensitive tasks/projects. Does the employee plan and organize tasks to achieve the desired results as efficiently and effectively as possible? Does the lack of planning and organizing result in low productivity? Does the employee identify available resources necessary to complete assigned tasks/projects? Does the employee make plans that are realistic and thorough? This factor also reports the employee's completion of assigned work by established deadlines. When deadlines were not met, did the employee provide timely advance notice and was an honest attempt made by the employee to meet the deadline? Are deadlines routinely met? Does the employee function only at the last minute? Does the employee separate the important from the urgent?
4. **WRITTEN COMMUNICATION SKILLS:** In this rating, factor the degree of excellence of the work performed by the employee is considered. Attention should be paid to the consequences of poor quality of work. Is the employee's work neat in appearance, accurate and thorough? The employee may be required to review letters, memos, and reports to assure accuracy. Does the employee communicate well in writing? Does poor quality work reflect adversely on the division, department, and state?
5. **ORAL COMMUNICATION SKILLS:** Demonstrates an employee's ability to present ideas effectively in formal and informal situations. The employee's thought process is clear and concise. This factor takes into consideration that the employee listens well and asks appropriate questions. Does the employee keep the supervisor and coworkers well informed?
6. **PROVIDING DIRECTION, LEADERSHIP:** Does the employee inspire others? Is he/she highly motivated? Does the employee give good direction and delegate assignments when appropriate? Is the employee exhibiting leadership qualities and work well as a team member with staff and management?
7. **CLIENT RELATIONS ("CLIENT" CAN MEAN THE PUBLIC OR STAFF TO WHOM SERVICES ARE PROVIDED):** Reports that an employee takes the initiative to insure that customers (external and internal) receive the respect and personal attention they deserve. The employee demonstrates that he/she feels personally responsible for treating customers in ways that meet or exceed the customer's expectations. Does the employee exhibit the necessary skills to handle sensitive issues with understanding, poise and perception? Is a positive ethical influence demonstrated?
8. **ATTITUDE:** The employee exhibits an ability to accept changing conditions and situations in work responsibility. This factor further takes into consideration the employee's ability to adapt positively to new work surroundings, new equipment, new procedures, or a new supervisor. This factor also reports the employee's acceptance of supervision, training, and supervisory instructions or directions, in addition to the degree of willingness that is exhibited by the employee when assigned responsibility and the manner in which the responsibility is carried out.



\_\_\_ Difficult to discern the meaning of written communications because of errors, incomplete \_\_\_ Unclear; may be rambling and lacking proper emphasis, or disorganized presentation or ideas, and/or does not listen and respond to the point. the inclusion of incorrect or irrelevant information.

**COMMENTS:**

**PROVIDING DIRECTION, LEADERSHIP**

- \_\_\_ Inspires others; is highly motivated; always gives clear direction, delegates assignments when appropriate.
- \_\_\_ Often creates "esprit de corps", gives credit when due; good role model.
- \_\_\_ Rarely provides leadership; but works well as team member with staff/management.
- \_\_\_ Does not work well with others; rarely takes part in group assignments.

**JUDGMENT**

- \_\_\_ Shows exceptional judgment in making sound and timely decisions under all conditions, is exceptional at considering the long term effects of decision
- \_\_\_ Handles most situations well; makes sound decisions under usual conditions, recognizes when additional information is necessary for non-routine decision.
- \_\_\_ Uses questionable judgment at times; room for improvement
- \_\_\_ Uses poor judgment in dealing with people and situations; unwilling and slow to make decisions.

**CLIENT RELATIONS (NOTE: "CLIENT" CAN MEAN THE PUBLIC OR STAFF TO WHOM SERVICES ARE PROVIDED.)**

- \_\_\_ Always answers client questions in an understandable manner; appropriately deals with customer complaints; holds up well under customer demands and abuse.
- \_\_\_ Provides continuous good client service.
- \_\_\_ Is impatient with client concerns.
- \_\_\_ Lacks courtesy; is contentious when dealing with client concerns.

**ATTITUDE**

- \_\_\_ Consistently Changes with changing requirements; relates exceptionally well with co-workers; accepts and follows rules and directions; willingly accepts responsibility beyond work objectives.
- \_\_\_ Usually is flexible; works well with co-workers; adheres to program requisites.
- \_\_\_ Flexible at times; sometimes insensitive.
- \_\_\_ Rigid and uncooperative.

**COMMENTS:**

## EMPLOYEE DEVELOPMENT

4. a) What can the employee do to improve his/her performance?
- b) What can the supervisor do to help the employee perform better?

## APPRAISAL SUMMARY

5. Check one category and write comments in the space below, if needed.

- ( ) **EXCEPTIONAL** Performance is unusual and clearly of distinguished quality. Contribution is unique and of high value to the Department.
- ( ) **ABOVE EXPECTED** Performance always exceeds standards. Contribution is above expected level.
- ( ) **EXPECTED** Performance meets all standards. Contribution is competent and acceptable.
- ( ) **BELOW EXPECTED** Performance is less than expected and needs improvement in one or more areas.
- ( ) **UNSATISFACTORY** Performance is clearly below expected. Development or other job action is required soon.

## COMMENTS

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## EMPLOYEE

- ( ) I have reviewed and read the evaluation.
- ( ) I agree with the overall evaluation.
- ( ) I do not agree with the overall evaluation.
- ( ) I wish to discuss the evaluation with a higher supervisor.

**EMPLOYEE COMMENTS**

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**EMPLOYEE SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_**

**SUPERVISOR SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_**

**APPOINTMENT AUTHORITY SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_**

## L. PERFORMANCE FACTORS FOR MANAGEMENT SERVICE EMPLOYEES

These factors should be used when the employee's job classification includes specific managerial duties.

**1. Planning and Achieving Results:** Sets performance standards and assess achievement of performance goals; accepts responsibility for the quality and timeliness of program/administrative performance; increases work unit productivity. Does the management service employee ensure that programs are managed with integrity and in compliance with state and federal laws, rules and regulations? Is the management service employee an effective problem-solver and decision-maker; does he/she support problem-solving and decision-making at the appropriate level? Does the management service employee develop, monitor and evaluate action plans in resolving problems? Does the management service employee understand program interests and issues? Does the management service employee demonstrate technical knowledge and programmatic expertise relevant to DAS programs and services? Does the management service employee participate in policy formulation; understand the process of promulgating rules and policies that carry out DAS statutory requirements?

**2. Communication:** Does the management service employee understand the importance of providing the opportunity for giving and receiving input? Does the management service employee manage meetings effectively? Does the management service employee possess effective listening skills and clearly communicates expectations? Does the management service employee communicate regularly with staff through meetings and one-on-one encounters? Does the management service employee write clearly and concisely and present information internally and externally?

**3. Customer Service:** Does the management service employee show active interest in customer/client needs through words and actions? Does the management service employee respond to customer requests in a timely manner and solicit customer feedback? Does the management service employee understand the customer's needs and measure customer satisfaction through customer surveys?

**4. Leadership:** Does the management service employee lead by example, serving as an appropriate role model? Does the management service employee remain visible and approachable, regularly interacting with others? Does the management service employee make decisions based on vision, mission and goals of DAS? Is the management service employee responsible and accountable for actions and results while demonstrating high ethical standards; keeping commitments, maintaining confidentiality and be relied on for integrity and truthfulness? Is the management service employee actively engaged in continuous learning; setting personal goals and creating a development plan to achieve them? Does the management service employee provide direction in a changing environment and articulate vision to employees? Does the management service employee work collaboratively with staff and stakeholders to identify solutions to problems and achieve common goals. Does the management service employee cultivate and nurture productive relationships in the division, with other state agencies as well as relevant local, county and tribal governments and their programs?

**5. Resource Management:** Does the management service employee effectively manage their time? Does the management service employee control costs and mitigate adverse financial aspects of operations while evaluating systems, both internally and externally to determine their impact on work performance? Does the management service employee effectively utilize resources to achieve the best possible outcome for clients, partners, stakeholders and employees? Does the management service employee effectively use technology and training to enhance performance and achieve goals?

**6. Teamwork:** Does the management service employee foster team cooperation, build trust among team members and create a commitment to team goals? Does the management service employee gain support and a buy-in-through participation of others and remain visible and approachable; interacting with others on a regular basis?

**7. Cultural Competence:** Does the management service employee understand DAS's affirmative action objectives and actively seek to achieve goals that promotes and fosters a diverse workforce and a discrimination/harassment-free workplace? Does the management service employee recognize the value of individual and cultural differences; create a work environment where individual differences are valued and where customers, stakeholder/partners and co-workers are consistently treated with dignity and respect? Does the management service employee value diverse viewpoints and actively solicit and engage diverse groups in program planning and implementation?

**8. Managing People (Applies to Supervisory Management):** Does the management service employee demonstrate knowledge of personnel policies and labor agreements? Does the management service employee select and retain capable, productive employees? Does the management service employee ensure clarity in performance expectations while assessing and working with employees to maximize strengths; coaching and mentoring employees towards excellence? Does the management service employee provide timely and thorough evaluations of employees and provide feedback? Does the management service employee take timely and appropriate corrective or disciplinary action when necessary? Does the management service employee maintain a productive working relationship with employees and their representatives while actively ensuring staff are moving towards achievement of DAS goals and objectives? Does the management service employee effectively delegate work when needed?

**9. Summary Statement: (Required)** This is where the rater notes more specific or personal comments regarding the management service employee's performance.

## M. RATING STANDARDS FOR MANAGEMENT SERVICE EMPLOYEES:

**Outstanding:** Total performance is well above normal standards for the position. Very few managers, if any, perform at this level in all categories. Only a truly exemplary employee should qualify for this overall rating.

**Exceeds Expectations:** Total performance is above average for the position. Few managers perform at this level in all categories.

**Meets Expectations:** Performance meets all standards, contribution is competent and acceptable. Most managers will be rated in this category.

**Improvement Needed:** Performance is less than expected and needs improvement in one or more areas. Total performance frequently or regularly falls short of normal acceptable standards. Deficiencies must be improved. This evaluation rating indicates the evaluator's belief that the manager can and will make the necessary improvements. Performance, which may result in an overall summary evaluation of "Improvement needed", should have been brought to the manager's attention in writing prior to this final rating being made.

**Unsatisfactory:** Performance is clearly below expected and a work plan for development of improved performance is required soon.

## Department of Administration

### MANAGEMENT SERVICE PERFORMANCE APPRAISAL

Employee Name: \_\_\_\_\_ Position Number: \_\_\_\_\_

Agency: Department of Administrative Services - Facilities

Classification Number: \_\_\_\_\_ Class Title: \_\_\_\_\_

Working Title: \_\_\_\_\_

Rating For:  Annual  Special

Report Period: Begin: \_\_\_\_\_ End: \_\_\_\_\_ Next Rating Due: \_\_\_\_\_

#### Instructions:

Performance appraisals are an opportunity for DAS managers to coach employees to excellence. Appraisals also provide managers and employees an opportunity to discuss the employee's overall work performance in terms of management competencies critical to DAS's mission, values and goals. Employees need to know how they are performing in their current job. Finally, appraisals provide the basis for creating a development plan for the coming year.

The first step in accomplishing this dialogue is to have the employee complete the Employee Performance Appraisal Participation Form. The manager then completes the appraisal, taking into account observations, information gathered, and employee input relating to the eight (8) competencies listed. The bulleted statements beneath the competency categories are intended to provide examples of the kinds of knowledge, skills, abilities, and attributes DAS considers important in relation to that competency. Not all bulleted statements apply to an employees work. Comment on the employee's work in relation to those statements that do relate, and then rate the employee's work in that competency.

Provide a summary statement as well. At the conclusion of the appraisal, rate the overall performance of the employee for the appraisal period under review.

For a more complete explanation of the management service appraisal process, please refer to the Manager Overview and Directions and Employee Overview.

## Planning and Achieving Results

- Sets performance standards and assesses achievement of performance goals; accepts responsibility for quality and timeliness of program/administrative performance; increases work unit productivity
- Assures that programs are managed with integrity and in compliance with state and federal laws, rules and regulations
- Is an effective problem-solver and decision-maker; supports problem-solving and decision-making at an appropriate level
- Develops, monitors and evaluates action plans in resolving problems
- Understands program interests and issues
- Demonstrates technical knowledge and programmatic expertise relevant to DAS programs and services
- Participates in policy formulation; understands the process of promulgating rules and policies that carry out DAS statutory requirements

Comments:

- Outstanding \*       Exceeds Expectations       Meets Expectations  
 Improvement Needed \*       Unsatisfactory

## Communication

- Understands the importance of providing the opportunity for giving and receiving input
- Manages meetings effectively
- Possesses effective listening skills
- Clearly communicates expectations
- Communicates regularly with staff through meetings and one-on-one encounters
- Writes clearly and concisely
- Presents information clearly and concisely
- Shares appropriate information internally and externally

Comments:

- Outstanding \*       Exceeds Expectations       Meets Expectations  
 Improvement Needed \*       Unsatisfactory

## Customer Service

- Shows active interest in customer/client needs through words and actions
- Responds to customer requests in a timely manner
- Solicits customer feedback
- Understands customer needs and ensures and measures customer satisfaction
- Provides/encourages quality and accurate information to customers

Comments:

- Outstanding \*       Exceeds Expectations       Meets Expectations  
 Improvement Needed \*       Unsatisfactory

## Leadership

- Leads by example; serves as appropriate role model
- Remains visible and approachable and regularly interacts with others
- Makes decisions based on vision, mission and goals of DAS
- Is responsible and accountable for actions and results
- Demonstrates high ethical standards; keeps commitments, maintains confidentiality, can be relied on for integrity, truthfulness
- Is actively engaged in continuous learning; sets personal goals and creates a development plan to achieve them
- Provides direction in a changing environment; articulates vision
- Works collaboratively with staff and stakeholders to identify solutions to problems and achieve common goals
- Cultivates and nurtures productive relationships with other state agencies as well as relevant local, county, and Tribal governments and their programs

Comments:

- Outstanding \*       Exceeds Expectations       Meets Expectations  
 Improvement Needed \*       Unsatisfactory

## Resource Management

- Effectively manages time
- Controls costs and mitigates adverse financial aspects of operations
- Evaluates systems, both internally and externally, to determine their potential impact on work performance
- Effectively utilizes resources to achieve the best possible outcome for clients, partners, stakeholders and employees
- Effectively uses technology and training to enhance performance and achieve goals
- Uses data to evaluate and improve the performance of work unit

Comments:

- Outstanding \*       Exceeds Expectations       Meets Expectations  
 Improvement Needed \*       Unsatisfactory

## Teamwork

- Fosters team cooperation, builds trust among team members and creates a commitment to team goals
- Gains support and buy-in-through participation of others
- Remains visible and approachable; interacts with others on a regular basis

Comments:

- Outstanding \*       Exceeds Expectations       Meets Expectations  
 Improvement Needed \*       Unsatisfactory

## Cultural Competence

- Understands DAS's affirmative action objectives and actively seeks to achieve goals
- Promotes and fosters a diverse workforce and discrimination/harassment-free workplace
- Recognizes value of individual and cultural differences; creates work environment where individual differences are valued
- Consistently treats customers, stakeholders/partners, co-workers with dignity and respect
- Values diverse viewpoints
- Actively solicits and engages diverse groups in program planning and implementation

Comments:

- Outstanding \*       Exceeds Expectations       Meets Expectations  
 Improvement Needed \*       Unsatisfactory

## Managing People

- Demonstrates knowledge of personnel policies and labor agreements
- Selects and retains capable, productive employees
- Ensures clarity in performance expectations
- Assesses and works with employees to maximize strengths; coaches and mentors employees towards excellence
- Provides timely and thorough evaluation of employees and provides feedback
- Takes timely, appropriate corrective/disciplinary action
- Maintains a productive working relationship with employees and their representatives
- Actively ensures staff are moving towards achievement of DAS goals and objectives
- Effectively delegates work

Comments:

- Outstanding \*       Exceeds Expectations       Meets Expectations  
 Improvement Needed \*       Unsatisfactory

- Attached is a position description which reflects revised duties since the last annual performance appraisal.
- The position description on file, dated \_\_\_\_\_, continues to reflect the duties of the position.

**Summary Statement: \*\***

**CUSTOMER SURVEY ACTION PLAN: \*\*\***

**Overall Performance Rating:**

- Outstanding \*
- Exceeds Expectations
- Meets Expectations
- Improvement Needed \*
- Unsatisfactory

Employee Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Employee's signature confirms only that the appraisal has been discussed with the employee and does not indicate agreement or disagreement with the content.

Reviewer Signature \_\_\_\_\_ Date: \_\_\_\_\_

Supervisor Signature \_\_\_\_\_ Date: \_\_\_\_\_

Appointing Authority \_\_\_\_\_ Date: \_\_\_\_\_

\* Requires a statement in support of the rating

\*\* Required

*For Office of Personnel Use Only*

*Forms Received:*

- Performance Appraisal Complete*
- Position Description (if applicable)*
- Training Plan*
- Employee Participation Form* *Reviewer Name* *date*

## N. PERFORMANCE FACTORS – DAS – FACILITIES – OPERATIONS & MAINTENANCE - REPRESENTED

### 1. Identification Section

Employee's Name

Supervisors Name

Title

Hire Date

Department

Evaluation Period

Length of time you have supervised employee

### 2. Position Description

Note that the updated Position Description has been attached, reflecting revised duties and/or miscellaneous information since the last annual performance appraisal. Or - The Position Description on file, dated \_\_\_\_\_ continues to reflect the duties of the position.

### 3. List of Functional Areas of Responsibility

List the essential functions of the position, and/or projects for which the employee is evaluated.

**Example:** This employee is responsible for the maintenance, troubleshooting and repair of air conditioning, refrigeration and heating systems and related control systems. The technician is assigned primarily to state owned facilities in the Portland area.

### 4. Rating Standards

- a. (5) **Outstanding:** Work performance is consistently superior to standards required for the job. Very few employees, if any perform at this level in all categories. Only a truly exemplary employee should qualify for this overall rating.
- b. (4) **Exceeds Expectations:** Work performance is consistently above the standard of performance for the position. Few employees perform at this level in all categories.
- c. (3) **Meets Expectations:** Work performance consistently meets the standards of performance for the position. Most employees will be rated in this category.
- d. (2) **Needs Improvement:** Work performance does not consistently meet the standard of performance for the position. Deficiencies must be improved. This evaluation rating indicates the evaluator's belief that the employee can and will make the necessary improvements. This rating level should have been brought to the employee's attention in writing prior to this final rating being made.
- e. (1) **Unacceptable:** Work performance is inadequate to the standards of performance required for the position. A work plan for development of improved performance is required soon.

### 5. Rating Factors

**Technical Skills** (Effectiveness with which the employee applies job knowledge and skill to job assignments)

- a. **Job Knowledge** – Does the employee have a practical knowledge of the job?
  - b. **Problem Analysis** – Does the employee use good problem identification and solving skills?
  - c. **Provides Suggestions for Work Improvement** - Does the employee see where improvements can be made and provide ideas for improvements in procedures?
  - d. **Employs Tools of the Job Competently** – Does the employee use the proper tools for the particular job or is it by trial and error that the job gets done?
  - e. **Follows Proper Safety Procedures** – Does the employee use the proper safety equipment and follow the appropriate safety procedures?
- ### 6. Quality of Work (Manner in which the employee completes job assignments)
- a. **Accuracy or Precision** – Does the employee use care in making sure the work is done accurately? Is the employee paying adequate attention to the details of the work?

- b. **Thoroughness/Neatness** – Is the employee using all the available resources to be thorough and present neat work?
  - c. **Reliability** – Is the employee dependable and punctual?
  - d. **Responsiveness to Requests for Service** – Does the employee respond to requests for service in a cheerful, willing manner?
  - e. **Follow-through /Follow-up** – Does the employee complete the work within a reasonable time and does the employee follow up afterwards to be sure the job was done to the customer's satisfaction?
  - f. **Judgment/Decision Making** – Does the employee use sound judgment in the decisions he/she makes? Are decisions made in a timely manner?
7. **Interpersonal Skills** (Effectiveness of the employee's interactions with others and as a team participant)
- a. **With Co-workers** – Does the employee create a sense of enthusiasm and purpose in their own team and always project a positive attitude?
  - b. **With Supervisors / Managers** – Does the employee treat supervisors and managers with respect?
  - c. **With Customers and Vendors** – Does the employee go “above and beyond“ to make sure that customers and vendors are served pleasantly and courteously?
  - d. **Team Participation** – Does the employee take personal interest in the team's success and participate fully in team activities?
  - e. **Team Contributions** – Does the employee give credit to other team members and inspire others to do their best?
  - f. **Commitment to Team Success** – Does the employee commit to the team's success above personal gratification?
8. **Communication Skills (If applicable to the job)**
- a. **Written Expression** – Does the employee pay attention to good grammar, spelling and punctuation? Does what the employee write make sense to the reader and is neat in appearance? Does the employee use plain language principles?
  - b. **Oral Expression** – Does the employee demonstrate the ability to present ideas effectively in formal and informal situations? Is the employee's thought process clear and concise? Does the employee listen well and ask appropriate questions?
  - c. **Shares Information Willingly** – Does the employee keep the supervisor and coworkers well informed?
  - d. **Tact and Diplomacy** – Does the employee use careful consideration of one's current situation and surroundings, and act accordingly? Does the employee use diplomacy with respect to managing negotiations, or handling professional relationships so there is no ill will?
9. **Approach to Work** (Characteristics the employee demonstrates while performing job assignments)
- a. **Actively Seeks Ways to Streamline Processes** – Does the employee look for ways to improve the ways things are done to make things run smoother and take less time?
  - b. **Open to New Ideas and Approaches** – Is the employee willing to listen to others new and different ideas or approaches to the work?
  - c. **Initiative** – Does the employee display drive and energy in accomplishing tasks? Is the employee able to handle several tasks comfortably, and display enthusiasm for the job and the division?
  - d. **Planning and Organization** – Is the employees' approach to assigned duties and time sensitive tasks/projects completed efficiently? Does the employee plan, organize tasks and set realistic timeframes to achieve the desired results as effectively as possible? Does lack of planning and organizational skills result in loss of productivity?

- e. **Flexible/Adaptable** – Is the employee flexible and adaptable to change? Do changes frustrate or upset the employee?
  - f. **Follows Instructions** – How well does the employee follow verbal or written instructions?
  - g. **Challenges Status Quo, Processes in Appropriate Ways** – Does the employee offer innovative solutions to enhance and/or streamline a process?
  - h. **Seeks Additional Training and Development** – Does the employee seek ways to develop as an employee, willing to participate in further training and seek ways to develop themselves professionally?
  - i. **Attendance** – Is the employee reliable, punctual and follows the rules on calling in when ill? Does the employee turn in leave request slips to their supervisor prior to taking the requested leave?
10. **Quantity of Work** (Employee’s success in producing the required amount of work) waits to the last minute to complete a task?
- a. **Amount of Work Completed** – Does the employee produce an adequate amount of work? Not enough work? Or over achieves and gets more done than required?
  - b. **Work completed on schedule** – Does the employee’s work get done on schedule or does nothing get done until up against the deadline? Does work get done before it is due on a regular basis?
  - c. **Works in a safe manner, takes an interest in promoting safety to others** – Does the employee use appropriate safety measures and equipment; watch out for coworkers’ safety and is willing to remind others of safe work practices?

## 11. Overall Performance Rating

### Unacceptable:

Work performance is inadequate and inferior to the stands of performance requested for the position. Performance at this level cannot be allowed to continue.

### Improvement Needed:

Work performance does not consistently meet the standards of performance for the position. Serious effort is needed to improve performance.

### Meets Expectations:

Work performance consistently meets the standards of performance for the position. Most employees will be rated at this level.

### Exceeds Expectations:

Work performance is consistently above the standard of performance for the position. Few employees perform at this level in all categories.

### Outstanding:

Work performance is consistently superior to the standards required for the job. Very few employees, if any, perform at this level in all categories.

12. **Supervisor’s Comments:** Comments should focus on personal observations of the employee’s performance, strengths and weaknesses. Additional comments may be attached.

13. **Action Plans/Training and Development Goals:** Summarize any specific projects, performance objectives, or training and development projected for the next review period.

14. **Employee Comments/Reactions:** This is optional, the employee may if he/she wishes to do so, add any comments concerning the appraisal in this section, or by an attachment e.g. “The Employee Participation Form”.

15. **Signatures:** The Supervisor signs first; then turns Appraisal in to the Administrator for review and comment (if applicable) and once the Administrator signs, the Supervisor reviews with the employee, who signs last.

## PERFORMANCE EVALUATION STATE OF OREGON, DAS, FACILITIES, O & M

Employee Name:	Supervisor's Name:
Title:	Title:
Hire Date:	Department:
Evaluation Period:	Length of time you have supervised employee: Year: _____ Months: _____

\_\_\_ Attached is a Position Description (PD) which reflects revised duties and/or miscellaneous information updates since the last annual performance appraisal.

\_\_\_ The Position Description (PD) on file, dated \_\_\_\_\_ continues to reflect the duties of the position.

### FUNCTIONAL AREAS OF RESPONSIBILITY

List below the essential functions of the position, and/or projects for which the employee is evaluated:

### Rating Standards

- ( 1 ) **Unacceptable**                      Work performance is inadequate to the standards of performance required for the position. Performance at this level cannot be allowed to continue.
- ( 2 ) **Needs improvement**              Work performance does not consistently meet the standards of performance for the position. Serious effort is needed to improve performance.
- ( 3 ) **Meets Expectations**              Work performance consistently meets the standards of performance for the position.
- ( 4 ) **Exceeds Expectations**            Work performance is consistently above the standard of performance for the position.
- ( 5 ) **Outstanding**                        Work performance is consistently superior to standards required for the job.
- Not Applicable**                         The employee is not required to perform in a specific rating factor, and it cannot be measured.

NA	1	2	3	4	5	RATING FACTORS	COMMENTS
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**Technical Skills** (Effectiveness with which the employee applies job knowledge and skill to job assignments)

NA	1	2	3	4	5	RATING FACTORS	COMMENTS
						Job Knowledge	
						Analyzes Problems	
						Provides Suggestions for Work Improvement	
						Employs Tools of the Job Competently	
						Follows Proper Safety Procedures	

**Quality of Work** (Manner in which the employee completes job assignments)

NA	1	2	3	4	5	RATING FACTORS	COMMENTS
						Accuracy or Precision	
						Thoroughness/Neatness	
						Reliability	
						Responsiveness to Requests For Service	

						Follow-Through/Follow-Up Judgment/Decision Making	
NA	1	2	3	4	5	RATING FACTORS	COMMENTS

**Interpersonal Skills** (Effectiveness of the employee's interactions with others and as a team participant)

						With Co-workers	
						With Supervisors	
						With Customers and Vendors	
						Team Participation	
						Team Contributions	
						Commitment to Team Success	

**Communication Skills** (If applicable to the job)

						Written Expression	
						Oral Expression	
						Shares Information Willingly	
						Tact and Diplomacy	

**Approach to Work** (Characteristics the employee demonstrates while performing job assignments)

						Actively Seeks Ways to Streamline Processes	
						Open to New Ideas and Approaches	
						Initiative	
						Planning and Organization	
						Flexible/Adaptable	
						Follows Instructions	
						Challenges Status Quo Processes in Appropriate Ways	
						Seeks Additional Training and Development	
						Attendance	

**Quantity of work** (Employee's success in producing the required amount of work)

						Priority Setting	
						Amount of Work Completed	
						Work Completed on Schedule	
						Works in a safe manner, takes an interest in promoting safety to others	

## Overall Performance Rating

Place an X in the box below that describes the employee's overall performance rating.

<input type="checkbox"/> Unacceptable	<input type="checkbox"/> Improvement Needed	<input type="checkbox"/> Meets Expectations	<input type="checkbox"/> Exceeds Expectations	<input type="checkbox"/> Outstanding
Work performance is inadequate and inferior to the standards of performance required for the position. Performance at this level cannot be allowed to continue.	Work performance does not consistently meet the standards of performance for the position. Serious effort is needed to improve performance.	Work performance consistently meets the standards of performance for the position.	Work performance is consistently above the standard of performance for the position.	Work performance is consistently superior to the standards required for the job.

**Supervisor's Comments**  
(Additional comments may be attached)

**Actions Plans/Training and Development Goals**  
(If applicable, summarize any specific projects, performance objectives, or training and development for the next review period)

**Employee Comments/Reactions**  
(Optional. If employee wishes to do so, any comments concerning the appraisal may be indicated in this section, or by an attachment)

<b>Employee Signature</b>	<b>Date</b>
I have read and discussed this evaluation with my supervisor and I understand its contents. My signature means that I have been advised of my performance status and does not necessarily imply that I agree with either the appraisal or the contents.	
<b>Supervisor Signature:</b>	<b>Date:</b>
<b>Reviewer Signature:</b>	<b>Date:</b>
<b>Appointing Authority Signature:</b>	<b>Date:</b>

**Note:** This form was designed as a tool to evaluate an employees current job performance in accordance with the Collective Bargaining Agreement between the State of Oregon and Oregon Public Employees Union 2001-2003.

# PERFORMANCE EVALUATION

(Use this page for narrative evaluation, as needed)

**Employee Name:** \_\_\_\_\_

**Employee:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Supervisor:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Reviewer:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Appointing Authority:** \_\_\_\_\_ **Date:** \_\_\_\_\_

# O. Performance Appraisal Process Flowchart

