



## Introductory Period (90 Day) Performance Evaluation

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

Employee Title: \_\_\_\_\_

Department: \_\_\_\_\_

Evaluation Dates: \_\_\_\_\_

The performance review process is designed to provide an opportunity for joint performance planning, ongoing performance feedback and progress reviews, and a final year-end review. The key goals of the program are to:

- Increase each employee's effectiveness in meeting the overall mission of the organization.
- Ensure ongoing communication and feedback between the supervisor and employee.
- Provide a formal basis for linking each employee's performance to the employee's pay.

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### Communication

Communication refers to the ability to inform orally and in writing, with clarity and good effect. It means to understand clearly and quickly when instructions or orders are received. It means judgment about what information is important and what is not, and what should be communicated, how, to whom and when.



#### Unacceptable/Unsatisfactory:

Regularly fails to communicate, listen to or correctly understand information, instructions, complaints, etc. Does not appear to grasp the significance of information communicated to them nor understand the need to pass on or respond to information in an appropriate and timely manner. Even routine information may be regularly misunderstood.



#### Below Expectations/Needs Improvement:

Shows inconsistency in communication. May display hesitation in passing on important information or in responding to or understanding information communicated to them. Instructions and requests may require repetition and explanation. Written or oral communication can may be inadequate, and may leave others confused or ill-informed.



#### Meets Expectations/Satisfactory:

Shows an understanding of the need to initiate or respond to information in an appropriate, timely and complete manner. Oral and written communications are usually acceptable, being both comprehensible and appropriate.



#### Exceeds Expectations/Commendable:

Shows an understanding of the need to initiate or respond to information in an appropriate, timely and complete manner. Oral and written communications are highly acceptable, being both comprehensible and appropriate. Involves the right people in discussion when issues arise.



#### Outstanding:

Displays a very quick grasp of the significance of information communicated and nearly always initiates or respond to communications in an appropriate, timely and comprehensive manner. Displays skill in reducing complex information to simple forms and helping others to understand that information. Involves the right people in discussions when issues arise, provides solid summaries of discussions and seeks consensus to summarize points discussed. Creates presentations to communicate issues.

**Comments:**

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**Professional Development & Learning**

Actively investigates new perspectives and opportunities and pursues training and development opportunities.

- Unacceptable/Unsatisfactory:**  
Employee demonstrates performance well below the required standard for the job. Employee is not current with the company policies or standards and may employ outdated learning to current situations. Does not attend professional conferences and may not recognize areas requiring improvement.
  
- Below Expectations/Needs Improvement:**  
Employee needs improvement to meet the required standard for the job. This may be improved with guidance, training or further experience. Soliciting feedback, seeking a mentor, or attending professional conferences may help.
  
- Meets Expectations/Satisfactory:**  
Actively investigates new perspectives and opportunities and pursues training and development opportunities. Completes training required and applies key learning. Meets the job's required standard. Recognizes areas needing improvement and works to increase skills.
  
- Exceeds Expectations/Commendable:**  
Actively investigates new perspectives and opportunities and pursues training and development opportunities. Completes new learning opportunities including additional training and coaching and applies new skills. Personal developmental goals align with organizational strategy. Skills, abilities, and effort enhance the job and benefit the organization.
  
- Outstanding:**  
Engages in systematic, self-directed training and development activities aligned with organizational objectives. Skills and abilities tend to very highly developed and applied with a consistent high effort. Applies learned skills to benefit the organization. Mentors others in the company.

**Comments:**

## Serving Students

The Serving Students competency involves a deep commitment to meeting the needs of students in a meaningful way. It means providing excellent service and support to students, both directly and indirectly, and striving to create a positive, inclusive, and supportive environment that fosters student success.

- Unacceptable/Unsatisfactory:** Generally inappropriate communication or inattentiveness causes many avoidable and sometimes quite serious problems. Usually the employee shows little or no skill in resolving these matters.
- Below Expectations/Needs Improvement:** Shows inconsistency in meeting customer service expectations of courtesy, sensitivity and prompt service. There may be evidence of strained relationships due to errors in judgment.
- Meets Expectations/Satisfactory:** Provides a high level of customer service even in difficult situations. Maintains courtesy, sensitivity and attentiveness to the customers' needs. Maintains positive relationships. Can usually find positive outcomes in difficult customer situations.
- Exceeds Expectations/Commendable:** Takes a leading role in building positive relationships and encouraging others to follow. Earns trust and respect and seldom makes an error in judgment. Provides a high level of customer service even in difficult situations. Maintains courtesy, sensitivity and attentiveness to the customers' needs.
- Outstanding:** Gets first-hand information and uses it to improve services. Acts with customers in mind and establishes and maintains positive relationships, earning customers' trust and respect. Provides the highest level of customer service even in difficult situations by prioritizing the needs. Presents self and organization policies in a manner that consistently reflect well on the organization.

### Comments:

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## Diversity & Inclusion

Diversity & Inclusion Core Values could include Inclusivity, Respect, Social Justice and Equity. Examples includes Works effectively with people from all backgrounds; Shows respect for and understanding of diverse points of view; Committed to the equal value and dignity of all people; Builds a culture that fosters engagement and diverse perspectives; Demonstrates commitment to creating and sustaining a diverse and inclusive workforce; Skillfully responds to situations, communications, and conduct that are inconsistent with these competencies and values

- Unacceptable/Unsatisfactory:** Below minimum job requirements.
- Below Expectations/Needs Improvement:** Barely meets job requirements.
- Meets Expectations/Satisfactory:** Satisfactorily meets job requirements.
- Exceeds Expectations/Commendable:** Clearly exceeds job requirements.

- Outstanding:** Substantially exceeds job requirements.

Comments:

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## Work Quality & Quantity

The ability to consistently produce high-quality work in a timely and efficient manner. This requires a strong work ethic and attention to detail, as well as a thorough understanding of job knowledge and processes.

- Unacceptable/Unsatisfactory:** Does not put forward the basic effort required to complete their job. This may include not completing work, lacking communication with internal and external partners. Uses available resources poorly.
- Below Expectations/Needs Improvement:** Effective in only some parts of their role. Provides incomplete or incorrect work and is not consistent. Sometimes meets the requirements of given tasks and projects but puts forth little effort in using company resources in an efficient manner.
- Meets Expectations/Satisfactory:** Adequately understands where to find and how to leverage company resources and uses them competently. Productively finishes tasks and projects on time.
- Exceeds Expectations/Commendable:** Makes great use of company resources and is very effective in their position. Shows strong initiative and creativity to do more than their assigned tasks. Saves money and time for their company and their team through creative problem solving.
- Outstanding:** Consistently innovative in their position, creates workflows and processes to be modeled in other departments. Output is routinely above and beyond.

Comments:

## Problem Solving

The Problem Solving competency involves the ability to identify and analyze complex problems, and develop effective solutions using logic, judgment, and data. Individuals with this competency can gather and evaluate information from a variety of sources, identify root causes and contributing factors, and generate and evaluate potential solutions.

- Unacceptable/Unsatisfactory:**  
May be disruptive in the organization. May be negative and hard to get along with. Style of relating to others is frequently inappropriate and appears to cause many avoidable and sometimes quite serious problems with peers, customers, suppliers and others. May participate in gossip.
- Below Expectations/Needs Improvement:**  
Shows inconsistency in interpersonal conduct. May be misinterpreted as too easy-going, lacking substance. May spend too much time building rapport, glad-handling. May benefit from building more constructive relationships.
- Meets Expectations/Satisfactory:**  
Has good relationships with most immediate peers, supervisors and customers. Recognizes the importance of building and maintaining positive work and team relationships. Avoids miscommunication, finds ways to resolve interpersonal problems. Gets along well with others. Does not participate in gossip.
- Exceeds Expectations/Commendable:**  
Has strong relationships with peers, subordinates, supervisors and customers. Successfully avoids trivial disputes and misunderstandings. Takes a leading role in building team spirit and encouraging trust and cooperation among others. May show talents in special areas such as persuasion, conflict resolution, motivation or leadership. Does not participate in gossip and may encourage others to stop when they hear it.
- Outstanding:**  
Easily builds relationships with individuals and groups. Makes a consistent effort to encourage trust and cooperation, and frequently take a leading role in fostering a positive and productive team spirit and in discouraging gossip. Always has a positive outlook and pleasant manner. Values diversity, accepts others. Stimulates teamwork and good attitude in others.

### Comments:

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## Management Leadership

Able to guide, direct, or influence people. Is resilient, persuasive and earns credibility by delegating and being adaptable. Exhibits strong strategic and operational decision-making skills.

**Required score for supervisory positions. If the employee is not in a supervisory role, please select N/A.**

- N/A:** Employee is not in a supervisory role.
- Unacceptable/Unsatisfactory:**  
Generally inappropriate for management and as a result causes many avoidable and sometimes quite serious problems. When problems pop up, he/she can't control emotions under pressure. Does not demonstrate the ability to

obtain the desired results through the work of others. Doesn't exhibit the command presence necessary for leading. Refuses to take a stand on issues. Neglects to show appreciation to staff.

**Below Expectations/Needs Improvement:**

- May struggle to lead, improved skills may increase confidence. May be reluctant to speak up and may be too laid-back at times when a more active approach is needed. Isn't currently comfortable standing out or being looked to in a crisis. May be overly concerned about criticism.

**Meets Expectations/Satisfactory:**

- Competent and dependable in a leadership position. Open-minded and flexible in thoughts and tactics. Able to deal with complexity. Effectively guides and directs others. Solid strategic and operational decision-making skills. Creates a positive work environment.

**Exceeds Expectations/Commendable:**

- Highly effective in a leadership position. Open minded and flexible in thoughts and tactics. Eager to deal with complexity. Effectively guides and directs others and communicates objectives clearly. Solid strategic and operational decision-making skills. Creates a positive work environment. Anticipates potential problems and develops contingency plans. Finds creative ways to inspire and motivate people.

**Outstanding:**

- Extraordinary leader. Open minded and flexible in thoughts and tactics. Seeks complex, global problems affecting the organization and proposes solutions. Predicts possible setbacks and develops contingency plans. Well-connected with individuals and groups, able to mobilize the right people to accomplish strategic change. Effectively guides and directs others and communicates organizational objectives clearly. Solid strategic and operational decision-making skills. Creates a positive work environment. Finds creative ways to inspire and motivate people.

**Comments:**

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## Goals

Use this section to add qualitative goals for your employee. Consider following the S.M.A.R.T. goals guidelines by creating goals that are specific, measurable, achievable, relevant and time bound.

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## Total Score

Please add up the number of ratings assigned in each category and indicate below:

Rating	Total
Unacceptable/Unsatisfactory:	<input type="text"/>
Below Expectations/Needs Improvement:	<input type="text"/>
Meets Expectations/Satisfactory:	<input type="text"/>
Exceeds Expectations/Commendable:	<input type="text"/>
Outstanding:	<input type="text"/>

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## Recommendation:

- Successful completion of introductory period and conversion to regular status
  - Extension of the introductory period
  - Release from University Corporation employment
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## Approvals

Supervisor Signature \_\_\_\_\_

HR Signature \_\_\_\_\_

Manager Signature \_\_\_\_\_

Employee Acknowledgement:

I certify that this report has been discussed with me. I understand my signature does not necessarily indicate agreement. I understand that I may respond in writing to any aspect of this evaluation and that this response will be placed in my personnel file.

Employee Signature \_\_\_\_\_