**Employee Performance Evaluation Summary Form**

**Evaluation Period:** 07/02/2011 to 06/30/2012  
**Evaluation Meeting Date:** 05/15/2012

**Employee:** John Doe  
**Job Title:** Administrative Assistant I  
**College (If Applicable):**  
**Immediate Supervisor/Manager:** Jake Doe

**Employee ID:** 000000000  
**PCN:** 00000  
**Department:** Human Resource Services  
**Title:** Manager  
**Phone:** 426-0000

**Type of Review:**
- [X] Annual Review
- [ ] Promotion Probation (Classified Employees Only)
- [ ] Entrance Probation (Classified Employees Only)
- [ ] Special Evaluation
- [ ] Special Evaluation Required/Requested – Date: ________

**Overall Performance Rating** (see expanded definitions on page 2):
- [ ] (3) Exemplary Performance
- [ ] (2) Exceeds Expectations Performance (Solid Sustained)
- [X] (1) Achieves Performance Standards
- [ ] (0) Does Not Achieve Performance Standards (Supervisor: This requires a special follow-up evaluation. Please contact HRS at 426-1616 to coordinate a follow-up special evaluation and performance improvement plan).

**Supervisor Summary Comments** (attach additional sheet if necessary):
Consistently goes above and beyond to be of service to any and all users of HRS/T&D services. He brings a positive attitude, creativity, and focus to all assignments.

**Employee Comments** (attach additional sheet if necessary):

**Signature Section:** Signature acknowledges: 1.) Review/update of PDQ or JDQ; and 2.) Discussion of evaluation (does not necessarily imply agreement). If job description has changed please email the signed, updated document to: compensation@boisestate.edu or fax the document to HRS Compensation at 426-3100. The immediate supervisor, chair, department director/dean must sign this document. Departments must check with the Provost/Vice President/President to determine if next review level is required.

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**Employee** (Print Name and Sign)  
**Date**  
**Immediate Supervisor’s Signature**  
**Date**

**Second Level Supervisor** (Print Name, Title, and Sign)  
**Date**

**Third Level Supervisor** (Dept. Dir/Dean) (Print Name, Title, and Sign)  
**Date**

**President, Provost, or Vice President** (If required)  
**Date**  
**If signature is not required, check here**

**Please return completed evaluation to:**  
Human Resource Services MS: 1265 ● 1910 University Drive, A-218 ● Boise, Idaho 83725-1265
Instructions:
The Performance Evaluation should include, at minimum, the following items:
1. Completed Summary Sheet which must include an overall performance rating
2. Outline of major job functions and duties
3. Review and update of position JDQ or PDQ by the Department. If job description has changed please email the signed, updated document to: compensation@boisestate.edu or fax the document to HRS Compensation at 426-3100.
4. Supervisor’s evaluation of employee’s performance with respect to major job functions and duties, any previously established performance goals, and standards
5. Performance goals and measures for next evaluation period (include employee professional development goals).

Introduction:
The Classified and Professional Staff Performance Management system utilizes the University’s Statement of Shared Values as the foundation that characterizes the University community. It describes the overarching principles for evaluating the general manner in which work is expected to be performed within the University community.

While not all of the University Shared Value concepts may relate to each position, such as volunteering within the University community or participating fully in the academic community’s pursuit of knowledge, we remind supervisors that the Shared Values serve as a guide for managers and an opportunity to open discussions about the University’s commitment to personal and social development, educational excellence, and civic engagement.

The University Standards of Conduct clearly describe how Boise State employees are expected to conduct themselves ethically, with integrity and civility. The Standards of Conduct are set out as a separate area that is to be used as an over-arching guide to evaluating the employee’s performance.

Boise State University Statement of Shared Values:

- **Academic Excellence** – engage in our own learning and participate fully in the academic community’s pursuit of knowledge.
- **Caring** – show concern for the welfare of others.
- **Citizenship** – uphold civic virtues and duties that prescribe how we ought to behave in a self-governing community by obeying laws and policies, volunteering in the community, and staying informed on issues.
- **Fairness** – expect equality, impartiality, openness and due process by demonstrating a balanced standard of justice without reference to individual bias.
- **Respect** – treat people with dignity regardless of who they are and what they believe. A respectful person is attentive, listens well, treats others with consideration and doesn’t resort to intimidation, coercion or violence to persuade.
- **Responsibility** – take charge of our choices and actions by showing accountability and not shifting blame or taking improper credit. We will pursue excellence with diligence, perseverance, and continued improvement.
- **Trustworthiness** – demonstrate honesty in our communication and conduct while managing ourselves with integrity and reliability.

Rating Guide (Expanded Definitions):

(3) Exemplary Performance – This employee performs at a level that results in significant accomplishments that may not have been otherwise achieved. This employee seeks out responsibility; shows a comprehensive understanding of the job objectives and is exemplary in meeting them. This employee is a master of the skills and abilities required for the job; is highly knowledgeable; may be sought out by others for job leadership, counsel, information, and/or direction. This employee may mentor or teach others; is a team player; creates and maintains positive working relationships; is a role model for behaviors necessary for success.

This employee completed complex or difficult assignments intelligently and effectively. This employee is innovative and produces an exceptional quantity of work, often ahead of schedule and with little supervision. The employee utilizes collaborative communication, actions, behaviors and work skills and develops effective working relationships with others; improves cooperation among participants in the workplace and prevents misunderstandings. This employee is proactive and demonstrates foresight in correcting situations that may cause future problems. This employee demonstrates innovation in meeting work demands and may demonstrate leadership skills.

(2) Exceeds Expectations Performance (Solid Sustained) – This employee is very accomplished in all work areas and demonstrates consistently proficient and solid performance in critical areas and exhibits sustained support of goals; is effective, consistent, and competent in meeting job expectations. This employee demonstrates ethical and collaborative behaviors that result in positive working relationships; consistently demonstrates significant knowledge, skills, and abilities required to accomplish job expectations.

This employee skillfully handles a variety of interpersonal situations. This employee typically performs above expectations in meeting deadlines, using critical thinking skills, and creativity to accomplish tasks, projects, and objectives. This employee often seeks out additional responsibility. This employee does not need direct supervision.

(1) Achieves Performance Standards – This employee meets job expectations. This employee may sometimes require more supervision, and work may require more revision or adjustment to meet expectations. Assignments are completed but occasionally require assistance from supervisor or peers. OR

This employee is developing new skills and gaining new knowledge, leading toward performing all expectations and objective of the job. This employee may be new to the position or job duties and may not have completed a full work cycle; this employee is still learning the job. This employee may need time to develop skills to be more proficient in the current position.

This employee is cooperative and treats customers, co-workers, and supervisors with respect and courtesy.

(0) Does Not Achieve Performance Standards – This employee’s performance or behavior needs improvement and/or is inconsistent or unacceptable. This employee may fail to meet one or more core performance standards and/or key job expectations and has had an identified action plan to ensure progress toward achieving all performance standards. Work previously identified as less than acceptable has not reached the expected level of performance.
Boise State University
Employee Performance Evaluation

**Key Responsibilities:**
List the employee’s key responsibilities or primary purpose (Refer to (Position job description) and/or JDQ (Job Description Questionnaire)) and update if necessary. “Key responsibilities” are the major functions or major areas of responsibility assigned to the position.

**Option 1: Establishing Key responsibilities for new employee to position (taken from PDQ)**

<table>
<thead>
<tr>
<th>Responsibility</th>
<th>Duties</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Customer Service</td>
<td>Represents the department and assists callers and visitors, and answers customer questions. Provides in-depth information about departmental services, programs, and policies. Interprets University policies and procedures to determine appropriate resolution of problems and issues. Handles angry, upset or difficult customers. <em>In an academic department, acts as a “quasi-advisor”, requires in-depth knowledge of a variety of programs, degrees and course requirements, advises student regarding academic processes, and schedules student/faculty conferences.</em></td>
</tr>
<tr>
<td>2. Schedules/Arrangements</td>
<td>Schedules meetings and appointments. Makes room reservations, arranges catering, and coordinates logistics. Plans conferences and events including logistical arrangements, registrations, catering, etc. Makes travel reservations. Processes travel requests and follows up with reconciliation of travel charges and receipts.</td>
</tr>
<tr>
<td>3. Record-keeping</td>
<td>Maintains files and databases for programs, students and other records. Gathers and compiles information for reports. Tracks and reconciles budgets for a variety of accounts. Understands account structure &amp; policies regarding payments and charges. Processes forms for a variety of business functions, such as purchasing of supplies, tracking and reconciliation of accounts, and provides follow up reports. Researches problems, collects information, and determines or recommends course of action for resolution.</td>
</tr>
<tr>
<td>4. Correspondence</td>
<td>Composes and word processes correspondence such as letters and memos, reports and other documents for supervisor’s or own signature. Documents may include sensitive and confidential information. Edits documents and reports, finalizes formats and arranges for printing of materials.</td>
</tr>
</tbody>
</table>

**Option 2: For ongoing key responsibilities –**
Provide support for Training & Development office of HRS. Manages training logistics: coordinates and advertises training schedules; improves training processes (forms, registration, room usage); schedules electronic classroom and other training sites; Review and updates content on HRS Website; assists with web enhancements. Coordinates training and development supported training activities. Provides back up assistance and support to EEO/AA Officer and their administrative assistant…..

Revised: 02/2012
Review of Past Performance Objectives:
Record objectives from the previous review period or initial employment objectives established for new employee in the space below. Provide feedback regarding the extent to which each objective was fulfilled within the Employee Performance Standard Section below. Also note changes (if any) to original objectives.

Option 1 – Sample:

Objective 1 - Customer Service:

Objective 2 – Schedules/Arrangements:
Contact additional presenters for Brown Bag lectures and mini-training sessions – coordinate room arrangements, equipment needs, and training advertisements.

Objective 3 – Record-keeping:
Harassment Prevention: Track Harassment Prevention participation by department and send out reminders and follow up for new employees (on-going)

Coordinate training registrations and send out confirmation letters, provide instructors with attendance sheets, evaluation forms and follow-up services

Objective 4 - Correspondence:
Coordinate training registrations and send out confirmation letters, provide instructors with attendance sheets, evaluation forms and follow-up services
Contact additional presenters for Brown Bag lectures and mini-training sessions – coordinate room arrangements, equipment needs, and training advertisements.

Objective 5 – Other Duties/Special Projects:
Update HRS Website with New Employee Orientation, Mediation, T&D Survey, and Training Resources. Coordinate placement with web-master.

Option 2 - Sample:

Objective 2: Harassment Prevention: Track Harassment Prevention participation by department and send out reminders and follow up for new employees (on-going)

Objective 3: Contact additional presenters for Brown Bag lectures and mini-training sessions – coordinate room arrangements, equipment needs, and training advertisements.

Objective 4: Coordinate training registrations and send out confirmation letters, provide instructors with attendance sheets, evaluation forms and follow-up services.

Objective 5:
**Employee Performance Standards:**
The following standards must be addressed. Describe specific achievements and contributions this employee has made to further the department or team’s accomplishments this year. Include specific areas needing performance improvement and include specific performance expectations and time frames needed to achieve performance standards. All ratings must include specific evaluation comments to justify or clarify performance ratings. See *Expanded Definitions* for rating examples.

<table>
<thead>
<tr>
<th>Performance Standard: Standard of Conduct</th>
<th>Rating: [ ]</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Definition:</strong> Describes how well the employee manages follows, supports, champions and models the following University Standard of Conduct:</td>
<td></td>
</tr>
<tr>
<td>1. Workplace Conduct: Acts fairly, collaboratively, and honestly in personal and group interactions and helps create and maintain a non-discriminatory, harassment free, drug/alcohol free, and respectful workplace. Ensures a safe work environment by adopting a proactive, cooperative attitude toward health and safety.</td>
<td></td>
</tr>
<tr>
<td>2. Compliance: Understands and adheres to State and Federal laws and rules as well as complying with University policies and other forms of guidance. Makes proper referrals for requests for information from the media and elected officials. Uses acceptable processes (University policies and procedures, chain of command, etc.) to bring issues to management’s attention to insure compliance. Remains engaged through issue resolution.</td>
<td></td>
</tr>
<tr>
<td>3. Financial Stewardship: Insures accurate financial transactions and reports and maintenance of internal controls. Utilizes University resources in an effective manner, identifies, discloses, and avoids potential conflict of interest, and reports waste, fraud and/or abuse. Maintains the duty and limits of confidentiality, including protecting the privacy of, and access to, records.</td>
<td></td>
</tr>
<tr>
<td>4. Individual Responsibility and Accountability: Demonstrates sound judgment, accepts responsibility, and holds themselves accountable for meeting the highest standards of service as well as established performance standards and developmental objectives.</td>
<td></td>
</tr>
</tbody>
</table>

**Evaluation Comments:**
John meets all of the University’s Standards of Conduct by ensuring and maintaining a safe and respectful workplace. John is proactive in his interactions with faculty, staff, students, and visitors by processing their requests in a friendly, respectful manner. He is always cheerful, even when responding to frustrated customers who may not understand University policies or state rules. John makes every attempt to anticipate not only how he may make current transactions successful but what the customer may also require in the future. John maintains confidentiality, completes accurate payments for training provided and accepts responsibility for getting the customers inquiries answered correctly.

<table>
<thead>
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<th>Performance Standard: Customer Service</th>
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<tr>
<td><strong>Definition:</strong> Describes how well the employee works with internal and external customers to achieve desired results and maintain positive customer relationships and professional image. The employee is expected to be polite and efficient in working with customers.</td>
<td></td>
</tr>
</tbody>
</table>

**Evaluation Comments:**
I get numerous letters and notes of appreciation for the level of customer service that John provides to our customers. He goes above and beyond in this area on a continual basis. His follow-up is amazing: He reaches out to his customers in a variety of methods to insure that he has met their needs.

<table>
<thead>
<tr>
<th>Performance Standard: Interpersonal Skills</th>
<th>Rating: [ ]</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Definition</strong> Describes how well the employee establishes and maintains effective work relationships. The employee demonstrates sensitivity to others and has good communication and listening skills.</td>
<td></td>
</tr>
</tbody>
</table>

**Evaluation Comments:**
John is very careful in his communications. He wants to insure that he always says and does the right thing and that the customer is happy with his level of service and interaction with T&D/HRS. He carefully crafts all written communications and tailors it for the audience and the media (email, letter or web). He is politically savvy and professional in all his interactions.

Revised: 02/2012
Performance Standard: Dependability  
**Definition:** Describes how well the employee completes assigned work in a timely manner, keeps commitments, is accountable, reliable and stays balanced under pressure. The employee meets attendance requirements.  
**Evaluation Comments:**  
Although John’s work schedule is 20 hours, there is no wasted time. He is totally present and focused on his work from the moment he enters the office until he concludes for the day. He is responsible and accountable for his actions and follows up whenever an issue may arise. There are so many demands placed on this position that there are some tasks that take longer or do not get completed within the timeframes initially projected; however, this is not any fault of John’s. He covered for the Administrative Assistant II for EEO/AA for more than 3 months and was handling both jobs to the best of his ability.

Performance Standard: Quality  
**Definition:** Describes the employee's work in terms of consistency, thoroughness, responsiveness, and accuracy. The employee supports and participates in continuous improvement in work processes, services or products. The employee demonstrates ethical dealings, effectively problem solving skills and meets quality standards set by supervisor.  
**Evaluation Comments:**  
John is always thinking! He wants to improve processes, services and insure that T&D/HRS always looks good or operates at its best! This is specifically noteworthy in the area of the T&D website, Let’s Talk sessions, and other training opportunities we can provide to the campus.

Performance Standard: Productivity  
**Definition:** Describes how the employee manages and completes workload expectations by setting and following priorities, using time effectively and achieves work goals. The employee demonstrates the knowledge and skills needed to do the job.  
**Evaluation Comments:**  
John carries with him our goals and action items and updates the progress regularly. He is very focused on tasks and is independent in how he carries out assignments. He will touch base to insure he is on track, note any other changes or new information and to make sure no one is ever hit with a surprise. He is thorough in his approach to assignments.

Performance Standard: Adaptability/Flexibility  
**Definition:** Describes how well the employee adapts to change and is open to different new ways of doing things. The employee demonstrates willingness to learn and apply new skills or methods in completing work assignments or projects.  
**Evaluation Comments:**  
John displays “Can do” attitude in everything he does. He steps up to the plate continually offering up support for others within the department – data entry for _____ and back-up support for _____, last minute design of mediation business cards and materials for a Benefits Fair, as well as research and assistance for other customers that utilize T&D services or provide training for us. He flexes his work schedule to accommodate HRS staff meetings and any other needs that arise (i.e. Employee Orientation programs, etc.).

Performance Standard: Work Environment/Safety  
**Definition:** Describes how well the employee promotes and supports a respectful workplace. The employee demonstrates support and compliance with general conditions of employment, EEO, security, and workplace safety policies. The employee demonstrates ethical behaviors and decision-making and compliance with appropriate federal, state laws, State Board of Education and University policies and procedures.  
**Evaluation Comments:**  
John is a true HR professional. He maintains confidentiality, is never involved in gossip or any negative workplace behaviors. He is always looking out for ways to improve the workplace for others with an eye toward finding training programs with an emphasis on safety (e.g. workplace violence, ergonomics, etc.).

Revised: 02/2012
### Additional Employee Performance Standards:
Use this section to define additional job related performance standards not covered above and evaluate employee’s performance against established standards (as outlined above).

**Performance Standard: Technical Duties**  
**Definition:** Describes how well the employee performs their technical duties related to their position (include department specific requirements).

<table>
<thead>
<tr>
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</table>

**Evaluation Comments:**

**Performance Standard: Employee Development**  
**Definition:** List professional development, workshops and training. This may include on-the-job training sessions attended for the previous rating period.

<table>
<thead>
<tr>
<th>Performance Standard: Employee Development</th>
<th>Rating: [ ]</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Definition:</strong> List professional development, workshops and training. This may include on-the-job training sessions attended for the previous rating period.</td>
<td></td>
</tr>
<tr>
<td>Achieved [ x]</td>
<td>Not Achieved [ ]</td>
</tr>
</tbody>
</table>

**Evaluation Comments:**  
Excel Class – Date Completed  
FrontPage –  
Web Design/HTML Credit Course….

<table>
<thead>
<tr>
<th>Performance Standard: ______________________</th>
<th>Rating: [ ]</th>
</tr>
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<tbody>
<tr>
<td><strong>Performance Standard: ______________________</strong></td>
<td></td>
</tr>
</tbody>
</table>

**Evaluation Comments:**

Next Review Period

**Performance Objectives:**
Use the following section to record performance objectives for the next review period. Include Performance measure, standards and timeframes as appropriate.

**Objective 1:** Create Performance Management Web Materials for the HRS Website

**Objective 2:** Continue New Employee Orientation/Benefits online materials

**Objective 3:**

**Objective 4:**

**Objective 5:**
Employee Development Plan

Employee Development Plan: This section should be completed after employee and manager have agreed upon areas of development or improvement needed and/or required as related to upcoming standards. It should include developmental objectives, corresponding development activities (on the job, formal training, workshops, conferences, etc.), measurements, and time frames for completion.

Developmental Objective 1: Learn Flash, Dreamweaver and other programs to enhance web development and design.

Developmental Objective 2:

Developmental Objective 3:

Developmental Objective 4: