LOYOLA
UNIVERSITY MARYLAND

2020-2021 Annual Supervisor Performance Evaluation Form

Employee Name: _____ **Title:** _____

Department: _____ **Supervisor:** _____

This evaluation covers the period of March 1st of the previous year to February 28th of the current year.

Loyola University Maryland's Performance Evaluation Form is designed to link employee performance to Loyola's mission and values as reflected in the Jesuit tradition and to provide guidance and consistency to the evaluation process. It assists the supervisor in making decisions about employee development, merit increases, promotions and continuing employment. It should be used to summarize and evaluate the employee's overall performance for the past year, to establish results to be achieved for specific tasks or projects for the next year, and to identify professional development goals to enable the employee to enhance performance in the current position or to prepare them for future growth.

Procedures

1. The employee completes a self-evaluation (unless that requirement is waived by the supervisor).
2. The supervisor prepares a written evaluation for the employee.
3. The second level supervisor approves the evaluation.
4. Human Resources reviews evaluations and completes the calibration process.
5. The supervisor discusses the evaluation with the employee and adds final comments.
6. The employee adds comments and signs-off.The supervisor signs-off.

Questions regarding Loyola's performance management process can be addressed to Human Resources at performancereview@loyola.edu or by calling 410-617-2354.

DEFINITION OF RATINGS

The performance levels described below are consistent with those used to determine merit increase ranges. Use these descriptions/levels when completing this section. Select the rating that best describes performance for each competency.

EXCEPTIONAL (5): Consistently exceeds all relevant performance standards. Provides leadership, fosters teamwork, is highly productive, innovative, responsive and generates top quality work. Active in industry-related professional and/or community groups.

EXCEEDS EXPECTATIONS (4): Consistently meets and often exceeds all relevant performance standards. Shows initiative and versatility, works collaboratively, has strong technical & interpersonal skills or has achieved significant improvement in these areas.

MEETS EXPECTATIONS (3): Meets all relevant performance standards. Occasionally exceeds desired results or objectives in one or more areas.

BELOW EXPECTATIONS (2): Sometimes meets the performance standards. Seldom exceeds and often falls short of desired results. Performance has declined significantly, or employee has not sustained adequate improvement, as required since the last performance review or performance improvement plan.

NEEDS IMPROVEMENT (1): Consistently falls short of performance standards.

Loyola Mission, Vision, and Values

Our Mission: Loyola University is a Jesuit Catholic university committed to the educational and spiritual traditions of the Society of Jesus and to the ideal of liberal education and development of the whole person. Accordingly, the University will inspire students to learn, lead and serve in a diverse and changing world.	**Our Vision:** Loyola University Maryland, anchored in Baltimore, will be a leading national liberal arts University in the Jesuit, Catholic Tradition.

Academic excellence – promotes a love for learning, discovery, and integration across a wide range of disciplines and interests. **Focus on the whole person** – honors, cares for, and educates the whole person by encouraging constituents to strive after intellectual, physical, psychological, social and spiritual health and well-being. **Integrity and Honesty** – integrity and honesty that is manifested in an atmosphere of open, civil discourse and careful, respectful listening where freedom of thought and expression are valued and protected. **Diversity** – encourages openness to new discoveries, ideas, methods, and perspectives and actively encourage and celebrate diversity in all forms. **Community** – strives to define goals and values clearly so as to ensure unity of purpose and to encourage shared ownership for the University's mission and vision. **Justice** – strives to foster global awareness, as well as a sense of solidarity with and care for all who struggle for justice. In particular, the University strives to foster awareness and understanding of first-world privilege, and of its attendant responsibilities for leadership and for advocacy of social and structural change.	**Service** – offers to all community members a rich variety of opportunities for solidarity and service both within and beyond the institution. **Leadership** – identifies, develops, encourages, and rewards the exercise of gifts of leadership in all community members in all areas of their lives. **Discernment** – encourages the practice of regular reflection and self-examination which foster awareness of the personal freedom (or lack thereof), a sense of personal responsibility for choices and actions, and a balance between enlightened self-interest and promotion of the common "greater" good. **Constant Challenge to Improve** – strives for improvement on an ongoing basis by holding out an ideal of personal wholeness and integration as the ultimate horizon of growth, while simultaneously recognizing that development and growth require time and sustained effort. The University seeks to encourage its constituent members to think creatively and to challenge the status quo when appropriate. Loyola also seeks to foster habits of learning, inquiry, and personal and corporate self-examination that encourage ongoing growth and change in its members.

Please provide specific examples of how Loyola's Institutional values were exhibited in the work setting. Discuss strengths and opportunities for improvement. The employee should provide a self-assessment, indicating how they have given expression to Loyola's mission through their work. Review the Loyola Mission

Self: N/A

Comments

Job Description

Employee Score: **Supervisor Score:** / 5.0 (30%)

Job Duties
Please rate the employee's job responsibilities for the review period. These should include the major responsibilities from the employee's position description and may occasionally include other responsibilities.

- ◯ Exceptional
- ◯ Exceeds Expectations
- ◯ Meets Expectations
- ◯ Below Expectations
- ◯ Needs Improvement

Job Description Comments

Provide comments about strengths and/or areas for improvement. Provide specific examples for a score graded above or below a "Meets Expectations" score. Include other comments as appropriate.

Job Description Comments

Self: N/A

Strategic and/or Operational Goals

Use this section to summarize results of goals that were established for this review period. Select the rating level that best describes the extent to which expectations were met for each goal. In the Results Achieved column, specify results achieved, to what extent expectations were met, and any contributing factors. If you are missing goals, please work with your supervisor to enter them now. You may also need to add the percentage weight to each goal.

Employee Score: **Supervisor Score:** / 5.0 (40%)

	Goals/Performance Standards	Results Achieved	Score	Weight
Self:	N/A	N/A	N/A	N/A
Title:			/5.0	%
Rating:	--------			

Add Past Goal

Core Competencies

Select a rating for the performance level demonstrated by the employee during the review period for the following competencies. Use the Planned Skilled Development column to address plans for improvement or to develop and reinforce strengths.

Core Competencies **Employee Score:** **Supervisor Score:** / **5.0 (15%)**

	Rating					
Competency	**5**	**4**	**3**	**2**	**1**	**N/A**
Cross-Cultural Sensitivity Demonstrates an awareness of, and sensitivity to, the needs and concerns of individuals from different cultures. Makes adjustments in communication style out of respect for cultural differences and minimizes the number of cross-cultural misunderstandings. This is quite different from those individuals who invest little or no time attempting to understand cultural differences and whose efforts to communicate across cultures often leads to misunderstandings.	○	○	○	○	○	○
Productivity/Quality Has established a track record of producing work that is highly accurate, that meets or exceeds productivity standards that have been established for their organizational level or position. Demonstrates attention to detail and reflects well on the organization. Has successfully combined skills, ability and effort level to ensure that expectations related to results/output are achieved. Is personally committed to high quality work and encourages others to have similar standards. This differs from those who cannot be relied upon to produce high quality work, pay little attention to detail, show little pride in a job well done and/or set a poor example for co-workers. These individuals fail to meet standards due to a shortfall in essential skills, ability or the level of energy/effort required.	○	○	○	○	○	○
Dependability Makes and fulfills commitments. Has established a pattern of working independently, meeting reasonable deadlines, and accepting responsibility for their actions. Willingly makes promises and fully intends to keep them. Arrives at work on time and ready to contribute. Shows up for meetings well-prepared. This contrasts with individuals who have proven to be unreliable when others have counted on them to show up on time, meet deadlines and expectations, or arrive prepared and ready to contribute.	○	○	○	○	○	○
Relationship Building / Customer Focus Builds rapport and develops alliances with a broad range of people. Demonstrates customers are a high priority. Adjusts communication style to meet the needs of individuals and clients at various organizational levels and responds to them in a timely and effective manner. Forms alliances by demonstrating concern and respect for others, as well as by highlighting common interests and aspirations. Leaves others feeling that they will be a trusted ally and is careful to act in ways that reinforce that trust over time. Anticipates and prevents delays or other things that can adversely affect the customer. Keeps customers informed about the status of pending actions and inquiries about customer satisfaction with products or services. This is in contrast with the behavior of individuals who tend to interact with a relatively narrow range of people or who fail to adjust their communication styles to accommodate others and tend to disappoint customers. It is also quite different than behavior that leaves the impression that the person is seeking to advance their own narrow agendas and interests and, leave them feeling forgotten and unimportant or that otherwise result in unmet needs or expectations.	○	○	○	○	○	○
Communication Communicates effectively and appropriately. Uses good judgment as to what to communicate to whom as well as the best way to get that accomplished. Speaks in a clear and credible manner, selecting the right tone for the situation and audience. Listens to others and allows them to make their point. This is quite different than those who tend to select the wrong means of communicating, or who communicate information to inappropriate people. It also contrasts with those whose messages are not clear or lack credibility, as well as those who demonstrate poor listening skills and are unreceptive to feedback.	○	○	○	○	○	○

Initiative Recognizes opportunities and initiates actions to capitalize on them. Looks for new and productive ways to make an impact. Demonstrates this characteristic when it comes to generating new ideas or processes, capitalizing on new business opportunities, seeking out and taking on increasing responsibility or resolving problems as they occur. Uses sound judgment about when to take action and when to seek guidance or permission. This is in contrast to those who fail to notice opportunities, wait to be asked or instructed before taking action, seldom offer new ideas or express reservations about taking on additional responsibilities.	○	○	○	○	○	○
Analytical Thinking Breaks down problems and issues into sub-components and then assesses the costs, benefits and risks of various options prior to selecting a particular approach. This contrasts with the behavior of individuals who tend to attack problems without a thorough examination of all important components and ramifications; who fail to weigh the costs, benefits and risks associated with various alternatives; and/or who are unable to explain or justify their decisions in a logical and systematic fashion.	○	○	○	○	○	○

Compentencies Comments

Provide comments about strengths and/or areas for improvement. Provide specific examples for all competencies graded above or below a "Meets Expectations" score. Include other comments as appropriate.

Compentencies Comments

Self: N/A

Supervisor Compentencies

Employee Score: **Supervisor Score:** / **5.0 (15%)**

	Rating					
Competency	**5**	**4**	**3**	**2**	**1**	**N/A**
Change Management Proactively assesses the need for change, seeing to it that appropriate resources are available to facilitate changes, considers factors that will support or hinder change initiatives, enthusiastically promotes change in terms of the the expected benefits, as well as removing or lowering the impact of potential obstacles. This is clearly different from those who tend to react to change and do so in a manner that reduces the probability that change will be successful. Examples of behavior on this end of the continuum include failing to allocate appropriate resources, creating obstacles to change, and tending to put more energy and effort level into resisting change.	○	○	○	○	○	○
Creating a Challenging Environment Creates an environment that ensures challenging goals that align with employee capabilities, organizational needs, and goals. This is achieved by ensuring that each employee: accepts goals that involve a challenging (yet realistic) level of risk; is motivated and encouraged to achieve goals; and believes that the goals are attainable with a reasonable level of effort. This contrasts with managers or leaders who: create (or accept) goals that are either too cautious or too challenging to attain; fail to motivate or encourage direct reports; and/or communicate a lack of confidence in one or more organizational goals.	○	○	○	○	○	○

Teamwork Is an effective team player who adds complementary skills and contributes valuable ideas, opinions and feedback. Communicates in an open and candid manner and can be counted upon to fulfill any commitments made to others on the team. This is distinctly different from those who withhold ideas and opinions, offer ideas or opinions that rarely add value to team discussions, have established a track record with many unmet commitments, and/or have not contributed skills that complement the skills of others on the team.	○	○	○	○	○	○
Managing Employee Performance Takes action to ensure that employees fully understand their roles, responsibilities and performance standards/expectations and provides ongoing feedback and support as employees strive to achieve expectations. Engages in two-way conversations throughout the year that ensure an up-to-date understanding of expectations, performance gaps and actions required to close any gaps. This is quite different from failing to adequately communicate expectations, being unaware of (or choosing to ignore) performance gaps, providing little or no support in overcoming barriers and failing to provide regular, ongoing feedback to employees.	○	○	○	○	○	○

Supervisor Compentencies Comments

Provide strengths and/or areas for improvement. Provide specific examples for all competencies graded above or below a "Meets Expectations" score. Include other comments as appropriate.

Supervisor Compentencies Comments

Self: N/A

New Strategic and/or Operational Goals

Identify a minimum of two new goals. These goals must be those the employee agreed to accomplish over the coming year.

Goals are specific assignments to participate in or manage ongoing or future projects. When setting project oriented goals, outline the scope of the role the employee is to play, lists resources and completion time frame and define the desired result.

Enter additional goals by clicking on the "Add New" button.

Goals	Weight
Title:	%
Title:	%

Title: %

Add New Goal

Professional/Service Development Plan

Supervisors and employees should use this section to plan for activities that:

- develop professional skills and competencies
- allow for participation in service and mission related programs
- address career development goals and aspirations

Please refer to the Mission and Community Service Leave policy for ideas on how to incorporate these activities into the annual planning.

Professional/Service Development Plan

Self: N/A

Title:

Add Development Plan

Overall Score

Score: / **5.0 (100%)**

The level of overall performance.

Comments

This section is for optional employee comments.

Supervisor Overall Comments:

Self: N/A

Employee Overall Comments: