

California State University, Long Beach  
**EMPLOYEE PLANNING AND PERFORMANCE REVIEW FORM**



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

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

**Type of Review** (Please check one box. Temporary employees receive annual or additional reviews only.)

- 1<sup>st</sup> Probationary
- 2<sup>nd</sup> Probationary
- 3<sup>rd</sup> Probationary
- Additional Reason: \_\_\_\_\_
- Annual (Annual Reviews reflect performance from July 1<sup>st</sup> – June 30<sup>th</sup> of each fiscal year.)

**Review Period**

From \_\_\_\_\_ To \_\_\_\_\_  
 Month/Year Month/Year

Complete the following sections of the Employee Planning and Performance Review Form.

**PLEASE NOTE:**

- Before completing this form with the employee being reviewed, please discuss and review it with your Administrative Services Manager (ASM).
- Issues of attendance, reliability, dependability, etc. should be addressed in Section III Item C.
- Any questions or concerns regarding the performance review process should be directed to your ASM or Staff Human Resources.

**SECTION I  
 REQUIRED CRITERIA**

(Use specific behavioral examples to support ratings in every category. Specific examples are mandatory for both exemplary and unacceptable ratings.)

**1. JOB SKILLS - Importance to Position**     Critical     Very Important     Important

Consider the ability needed to perform the major responsibilities of this job as noted in the position description.

Exemplary <input type="checkbox"/>	Commendable <input type="checkbox"/>	Satisfactory <input type="checkbox"/>	Needs Improvement <input type="checkbox"/>	Unacceptable <input type="checkbox"/>
Consistently demonstrates exceptional skills in performing the major responsibilities of this job.	Often demonstrates skills that exceed those needed to perform the major responsibilities of this job.	Regularly demonstrates skills that meet and periodically may exceed those needed to perform the major responsibilities of this job.	Often fails to demonstrate skills needed to perform the major responsibilities of this job.	Consistently fails to demonstrate skills needed to perform the major responsibilities of this job. <b>Immediate action is required.</b>

Please support your rating in the narrative section below:

**2. AMOUNT OF WORK ACCOMPLISHED - Importance to Position**  Critical  Very Important  Important  
 Consider the amount of work performed as it relates to achieving the tasks and goals of this position.

Exemplary <input type="checkbox"/>	Commendable <input type="checkbox"/>	Satisfactory <input type="checkbox"/>	Needs Improvement <input type="checkbox"/>	Unacceptable <input type="checkbox"/>
Consistently produces an exceptional amount of work for this position.	Often produces an amount of work that is substantially above the standards for this position.	Regularly produces an amount of work that meets the standards set for this position and periodically may exceed them.	Often fails to produce an amount of work that meets the standards set for this position.	Consistently fails to produce an amount of work that meets the standards set for this position. <b>Immediate action is required.</b>

Please support your rating in the narrative section below:

**3. QUALITY OF WORK - Importance to Position**  Critical  Very Important  Important  
 Consider accuracy, organization, effectiveness, and completeness of the employee's work and the degree to which the employee follows through on assignments and completes them on time. Consider how the work compares to quality performance standards and goals for the employee's position. Also consider the amount of supervisory review required to assure work quality.

Exemplary <input type="checkbox"/>	Commendable <input type="checkbox"/>	Satisfactory <input type="checkbox"/>	Needs Improvement <input type="checkbox"/>	Unacceptable <input type="checkbox"/>
Produces exceptional work that consistently exceeds performance standards and expectations for this position in a timely manner with minimal or no supervision.	Often produces work that is substantially above performance standards and expectations for this position in a timely manner with minimal supervision.	Regularly produces work that meets performance standards and expectations for this position in a timely manner with the appropriate level of supervision.	Often produces work that fails to meet performance standards and expectations for this position and/or is not completed in a timely manner; more than the appropriate level of supervision is required.	Consistently fails to produce work that meets the performance standards and expectations for this position and/or is not completed in a timely manner; an unusually high level of supervision is required. <b>Immediate action is required.</b>

Please support your rating in the narrative section below:

**4. INITIATIVE AND PROBLEM SOLVING - Importance to Position**  Critical  Very Important  Important

Consider willingness to make improvements in work methods, identifying and correcting errors, work-related problem solving, and willingness to seek ways to improve individual and departmental job performance.

Exemplary <input type="checkbox"/>	Commendable <input type="checkbox"/>	Satisfactory <input type="checkbox"/>	Needs Improvement <input type="checkbox"/>	Unacceptable <input type="checkbox"/>
Consistently generates constructive ideas for change that will improve work effectiveness and/or address work problems. Consistently seeks ways to improve individual and department performance that go beyond expectations for this position. Consistently anticipates departmental needs and takes action to meet them without supervisory direction.	Often suggests constructive ideas for change that will improve work effectiveness and/or address work problems. May seek ways to improve individual and department performance that go beyond expectations for this position. Often anticipates department needs and takes actions to meet them with little supervisory direction.	Regularly suggests constructive ideas for change that will improve work effectiveness and/or address work problems. Periodically may seek ways to improve individual and department performance that go beyond expectations for this position. Regularly anticipates departmental needs and takes action to meet them with an appropriate level of supervisory direction.	Often does not seek ways to improve individual and departmental performance. Seldom suggests constructive ideas for change that will improve work effectiveness and/or address work problems. Requires explicit instructions to undertake a new task.	Consistently ignores obvious problems that will negatively affect the work environment. Only accepts responsibility for regular duties. Unwilling to start or continue any task without detailed instructions from supervisor. <b>Immediate action is required.</b>

Please support your rating in the narrative section below:

**5. WORKING RELATIONSHIPS - Importance to Position**  Critical  Very Important  Important

Consider willingness to establish and maintain cooperative working relationships with all co-workers and other members of the University; if appropriate, include external agencies and the general public. Consider sensitivity to and awareness of differences in people of diverse backgrounds.

Exemplary <input type="checkbox"/>	Commendable <input type="checkbox"/>	Satisfactory <input type="checkbox"/>	Needs Improvement <input type="checkbox"/>	Unacceptable <input type="checkbox"/>
Consistently maintains exceptional relationships with others, providing a very high level of assistance, reinforcement, and support that goes beyond that required by the position. Work relationships contribute to a strong positive environment.	Often maintains very good relationships with others, providing a level of assistance, reinforcement, and support that goes beyond that required by the position. Work relationships contribute to a positive environment.	Regularly maintains good relationships with others, providing a level of assistance, reinforcement, and support appropriate for the position.	Often has problems relating to others and fails to demonstrate sensitivity to others' needs; does not actively assist, reinforce, or support others.	Consistently has problems relating to others, lacks respect for others, and is indifferent to others' needs. <b>Immediate action is required.</b>

Please support your rating in the narrative section below:

**6. COMMUNICATION SKILLS - Importance to Position**  Critical  Very Important  Important

Consider the ability to provide clear, concise, and effective verbal and written communications, make effective oral presentations and deliver consistent, high quality customer service.

Exemplary <input type="checkbox"/>	Commendable <input type="checkbox"/>	Satisfactory <input type="checkbox"/>	Needs Improvement <input type="checkbox"/>	Unacceptable <input type="checkbox"/>
Consistently provides information to internal and external customers that is exceptionally clear, concise, and complete. Listens to others effectively. Writing is consistently organized, precise, and adapted to the objectives and intended readers. Has exceptional ability to convey important points clearly in a way that is appropriate to the audience.	Often provides information to internal and external customers that is very clear, correct, and concise; listens to others effectively. Writing often is clear, logical, complete, and precise, including appropriate details. Skills are advanced and exceed the requirement of the position. Has very good ability to convey important points clearly in a way that is appropriate to the audience.	Regularly provides information to internal and external customers that is clear, correct, and concise; effectively listens to others. Writing skills meet, and occasionally may exceed, those required by the position. Has the ability to convey important points clearly in a way that is appropriate to the audience.	Often conveys information to internal and external customers that is incomplete, incorrect, or confusing; often fails to listen to others and to verify their understanding of what is being communicated. Writing is often unacceptable and needs improvement in overall quality. Often fails to convey important points clearly or may not present them in a way that is appropriate to the audience.	Consistently provides information to internal and external customers that is incomplete, incorrect, or confusing; consistently fails to listen to others and to verify their understanding of what is being communicated. Difficult to determine the meaning of written communication because of errors, incomplete or disorganized presentation of ideas, and/or inclusion of incorrect or irrelevant information. Consistently fails to convey important points clearly or fails to present the points in a way that is appropriate to the audience. <b>Immediate action is required.</b>

Please support your rating in the narrative section below:

**SECTION II  
ADDITIONAL OR ENHANCING CRITERION**

**(Add additional criteria if needed. Please describe each additional performance criterion below)**

**7. SUPERVISORY/LEAD RESPONSIBILITIES - Importance to Position**  Critical  Very Important  Important

Consider ability to plan, organize, delegate, and follow up on work-flow to meet unit's goals and objectives. Provides clear expectations and constructive feedback to subordinates on a consistent basis. Consistently treats subordinates fairly.

Exemplary <input type="checkbox"/>	Commendable <input type="checkbox"/>	Satisfactory <input type="checkbox"/>	Needs Improvement <input type="checkbox"/>	Unacceptable <input type="checkbox"/>
Consistently exceeds expectations for supervisory/lead employee.	Often exceeds expectations for supervisory/lead employee.	Regularly meets expectations for supervisory/lead employee.	Often fails to meet expectations for supervisory/lead employee.	Consistently fails to meet expectations for supervisory/lead employee. <b>Immediate action is required.</b>

Please support your rating in the narrative section below:

8. TYPE ADDITIONAL CRITERIA HERE - Importance to Position  Critical  Very Important  Important

Type additional criteria description here.

Exemplary <input type="checkbox"/>	Commendable <input type="checkbox"/>	Satisfactory <input type="checkbox"/>	Needs Improvement <input type="checkbox"/>	Unacceptable <input type="checkbox"/>
Provide definition of Exemplary here.	Provide definition of Commendable here.	Provide definition of Satisfactory here.	Provide definition of Needs Improvement here.	Provide definition of Unacceptable here.

Please support your rating in the narrative section below:

### SECTION III EMPLOYEE DEVELOPMENT

- A. Use the space below to list goals from previous review period and describe how employee has/has not met these goals.

**SECTION III  
EMPLOYEE DEVELOPMENT (continued)**

B. Provide examples of positive achievements.

C. Provide specific examples that occurred during this review period which demonstrate this employee's need for improvement.

D. What specific training, professional development, or other learning experiences and goals for the **next evaluation period** would you recommend for this employee's performance and development plan

## OVERALL RATING

Exemplary <input type="checkbox"/>	Commendable <input type="checkbox"/>	Satisfactory <input type="checkbox"/>	Needs Improvement <input type="checkbox"/>	Unacceptable <input type="checkbox"/>
<p>This rating is reserved for the highest level of performance that consistently exceeds standards and expectations during the evaluation period. An employee receiving this rating should have a consistent record of achievement.</p>	<p>This rating applies to an employee who consistently meets standards and expectations, often exceeds them, and shows initiative in additional achievements.</p>	<p>The employee's work regularly meets the department's standards and expectations for performance; periodically performance may exceed these standards. This rating reflects that the employee makes a solid and positive contribution to the department and that the employee's performance is overall satisfactory.</p>	<p>This rating is appropriate when an employee periodically meets the standards but too often does not do so, which negatively impacts the overall performance level. The employee must improve his/her efforts, knowledge, performance, skills, and/or behavior in order to achieve a satisfactory level of evaluation.</p>	<p>The employee's performance is consistently deficient, unacceptable, and seriously impacts job outcomes. <b><i>Immediate action by the employee to improve performance is required.</i></b></p>

**EMPLOYEE COMMENTS** (to be completed by employee only): Please attach an additional sheet if necessary.

\_\_\_\_\_  
Employee Signature and Date (*Signature does not indicate agreement*)

Draft copy of this evaluation presented to employee on: \_\_\_\_\_

\_\_\_\_\_  
Department/Unit Evaluator's  
Signature and Date

\_\_\_\_\_  
Appropriate Administrator  
Signature and Date

\_\_\_\_\_  
Department Use (Optional)  
Signature and Date