

# Case Western Reserve University Performance Management Outline for the Development and Evaluation of Secretarial/Clerical, Research Assistant I, Technicians, Maintenance and Service Staff

Case Western Reserve University is a leading independent center for education, research and community citizenship. The University achieves its goals through the performance and excellence of each individual. The University expects all of its staff employees to exemplify its values through commitment to service and concern for human relationships. As an organization, we value:

A working environment that encourages:

- Mutual respect and open communication
  - Innovation and continuous learning
  - A cooperative spirit and teamwork
  - Respect for diversity and inclusiveness
- Personal growth and celebration of accomplishments
  - Safety orientation

Personal responsibility based on:

- Integrity and ethics
- Accountability for results
- Clear goals and empowerment
  - Dependability
- Protecting resources against waste, loss, or misuse

A customer-focused service orientation which exhibits:

- Concern for the customer's goals and needs
  - Economy, efficiency, and flexibility
  - Courtesy
- Responsiveness with good judgment
- Continuous and measurable improvements

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

Job Title \_\_\_\_\_

Department \_\_\_\_\_

Evaluator \_\_\_\_\_

Objectives & Development Planning Period:

From \_\_\_\_\_ Through \_\_\_\_\_

# Performance Management Outline

## SECTION I

### Responsibilities/Objectives and Performance Standards in Support of Departmental Goals “Maximizing one’s professional qualifications to make a difference”

| Primary Performance Expectations:<br>Responsibilities/Objectives and Standards | Mid-Year<br>Progress Notes | End of Period Rating<br>of Success and Effectiveness<br>Comment and Place X on Scale<br>to Rate<br>Not Strong                  Very Strong |
|--|----------------------------|--|
| Objective 1:   |                            | ----- ----- ----- -----  |
| Objective 2:   |                            | ----- ----- ----- -----  |
| Objective 3:   |                            | ----- ----- ----- -----  |
| Objective 4:   |                            | ----- ----- ----- -----  |
| Objective 5:   |                            | ----- ----- ----- -----  |

|  |      |          |      |                  |      |          |      |
|--|------|----------|------|------------------|------|----------|------|
| Objectives for new rating period reviewed and agreed to: |      |          |      | Mid-Year Review: |      |          |      |
| Evaluator  | Date | Employee | Date | Evaluator        | Date | Employee | Date |

**SECTION II**

**Performance Competencies  
“Making a Difference by Working and Learning Together.”**

|   | Mid-Year Progress Notes | End of Period Rating of Success and Effectiveness<br>Comment and Place X on Scale to Rate<br>Not Strong                      Very Strong |
|---|-------------------------|--|
| <b>Job Knowledge/Competency:</b> Demonstrates the knowledge and skills necessary to perform the job effectively. Performs responsibilities in accordance with job procedures and policies. Acts as a resource person upon whom others rely for assistance.  |                         | ----- ----- ----- -----  |
| <b>Quality/Quantity of Work:</b> Completes assignments in a thorough, accurate, and timely manner that achieves expected outcomes. Exhibits concern for the goals and needs of the department and others that depend on services or work products. Effectively handles multiple tasks. Uses work time productively. |                         | ----- ----- ----- -----  |
| <b>Dependability:</b> Meets department/university attendance standards.   |                         | ----- ----- ----- -----  |
| <b>Teamwork and Cooperation:</b> Maintains harmonious and effective work relationships with fellow employees, supervisors and others. Adapts to changing priorities and demands. Shares information and resources with others to promote positive and collaborative work relationships.                             |                         | ----- ----- ----- -----  |
| <b>Interpersonal and Communication Skills:</b> Exercises courtesy, tact and respect when interacting with all members of the University community and external constituents. Listens carefully to requests and seeks clarification to ensure understanding.   |                         | ----- ----- ----- -----  |
| <b>Initiative/Commitment:</b> Demonstrates personal responsibility when performing duties. Offers assistance to support the goals and objectives of the department and division. Performs with minimal supervision. Seeks guidance when goals or priorities are unclear.  |                         | ----- ----- ----- -----  |

|   |      |          |      |
|---|------|----------|------|
| Competencies Reviewed and Discussed:                      Mid-Year Review |      |          |      |
| Evaluator   | Date | Employee | Date |

**SECTION III**

**End of Period Summary Performance Rating**

Based on a review of Section I, Success and Effectiveness in Position Responsibilities/Accomplishing Objectives and Standards, and Section II, Performance Competencies, provide a summary performance rating:

Comments:

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- Performance consistently and significantly above standards in virtually all areas; far exceeds normal expectations.
- Performance well above standards in many important aspects; usually exceeds normal expectations.
- Performance meets standards in all important aspects; good contributor.
- Performance slightly below standards in some important aspects, but meets standards in others; performance generally acceptable but improvement needed to fully achieve functional performance level.
- Performance below standards in a number of critical aspects; substantial improvement needed.

\_\_\_\_\_  
Evaluator Signature

\_\_\_\_\_  
Date

I have read this appraisal and it has been discussed with me. I understand that signing this appraisal does not necessarily mean I agree with all of the information in it or that I forfeit my right for review.

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

\_\_\_\_\_  
Date