

## Employee Handout - Performance Factors

1. **DUTIES, RESPONSIBILITIES & COMPETENCIES:** Evaluate the employee's understanding of the purpose of the position and performance of the essential duties and responsibilities. Assess the employee's competencies - knowledge, skills and abilities - required by the position.

<input type="radio"/>	<b>Meets or Exceeds Expectations.</b> <i>(Understands the purpose of the position; performs the essential duties and responsibilities of the position; possesses the required competencies - knowledge, skills and abilities; needs minimal supervision; rarely makes and/or repeats mistakes; rarely needs retraining.)</i>
<input type="radio"/>	<b>Needs Improvement.</b> <i>(Has an incomplete understanding of the purpose of the position; needs to improve some of the required competencies - knowledge, skills and abilities; needs more than routine supervision; occasionally makes and/or repeats mistakes; needs occasional retraining.)</i>
<input type="radio"/>	<b>Unsatisfactory.</b> <i>(Lacks a basic understanding of the purpose of the position; does not perform many of the essential duties and responsibilities of the position; does not possess many of the required competencies - knowledge, skills and abilities; needs frequent supervision; frequently makes and/or repeats mistakes; needs frequent retraining.)</i>

2. **QUANTITY OF WORK:** Evaluate the amount and timeliness of acceptable work performed or produced by the employee. Acceptable work is that which is appropriate for the primary purpose, duties and responsibilities of the position.

<input type="radio"/>	<b>Meets or Exceeds Expectations.</b> <i>(Volume and timeliness of work is satisfactory.)</i>
<input type="radio"/>	<b>Needs Improvement.</b> <i>(Volume of work needs to increase; occasionally misses deadlines.)</i>
<input type="radio"/>	<b>Unsatisfactory.</b> <i>(Volume of work does not meet minimum requirements; frequently misses deadlines.)</i>

3. **QUALITY OF WORK:** Evaluate the accuracy, completeness and attention to detail of acceptable work performed or produced by the employee. Acceptable work is that which is appropriate for the primary purpose, duties and responsibilities of the position.

<input type="radio"/>	<b>Meets or Exceeds Expectations.</b> <i>(Work is accurate, complete and rarely contains unacceptable errors; rarely requires supervisory correction.)</i>
<input type="radio"/>	<b>Needs Improvement.</b> <i>(Needs to complete more work assignments without unacceptable errors; occasionally requires more supervisory correction.)</i>
<input type="radio"/>	<b>Unsatisfactory.</b> <i>(Work is frequently incomplete and/or contains unacceptable errors; requires frequent supervisory correction.)</i>

4. **CLIENT RELATIONSHIPS/CUSTOMER SERVICE:** Evaluate the effectiveness of the employee's interaction with clients and focus on service. A client includes, but is not limited to, PSU students, PSU employees and other individuals not associated with PSU.

<input type="radio"/>	<b>Meets or Exceeds Expectations.</b> <i>(Cooperative and pleasant when interacting with clients; is responsive to client needs; establishes harmonious relationships and works well with clients; rarely needs supervisory intervention.)</i>
<input type="radio"/>	<b>Needs Improvement.</b> <i>(Needs to be consistently cooperative and pleasant when interacting with clients; has occasional difficulty responding to client needs, establishing harmonious relationships and working with clients; occasionally needs more than routine supervisory intervention.)</i>
<input type="radio"/>	<b>Unsatisfactory.</b> <i>(Frequently uncooperative and unpleasant when interacting with clients; has frequent difficulty responding to client needs, establishing harmonious relationships and working with clients; frequently needs supervisory intervention.)</i>

5. **TEAMWORK:** Evaluate the effectiveness of the employee's interaction with colleagues and contributions to the goals of the department or work unit.

<input type="radio"/>	<b>Meets or Exceeds Expectations.</b> <i>(Cooperative and pleasant when interacting with colleagues; establishes harmonious relationships and works well with colleagues; is an active contributor to the goals of the department or work unit; rarely needs supervisory interaction.)</i>
<input type="radio"/>	<b>Needs Improvement.</b> <i>(Needs to be consistently cooperative and pleasant when interacting with colleagues; has occasional difficulty establishing harmonious relationships and working with colleagues; contributions to the goals of the department or work unit need to be improved; occasionally needs more than routine supervisory intervention.)</i>
<input type="radio"/>	<b>Unsatisfactory.</b> <i>(Frequently uncooperative and unpleasant when interacting with colleagues; has frequent difficulty establishing harmonious relationships and working with colleagues; rarely contributes to the goals of the department or work unit; frequently needs supervisory intervention.)</i>

6. **COMMUNICATION SKILLS:** Evaluate the effectiveness of the employee's written and verbal communication skills.

<input type="radio"/>	<b>Meets or Exceeds Expectations.</b> <i>(Communication is clear, concise and professional; shares and maintains information appropriately.)</i>
<input type="radio"/>	<b>Needs Improvement.</b> <i>(Needs to improve clarity, conciseness or professionalism of communication; occasionally shares or maintains information inappropriately.)</i>
<input type="radio"/>	<b>Unsatisfactory.</b> <i>(Communication is frequently not clear, concise, or professional; frequently does not share or maintain information appropriately.)</i>

7. **INITIATIVE & FLEXIBILITY:** Evaluate the employee's ability to identify and respond to changes, problems and/or difficult or dangerous situations.

<input type="radio"/>	<b>Meets or Exceeds Expectations.</b> <i>(Responds appropriately to changes, problems and/or difficult or dangerous situations; frequently suggests improved work methods and assumes additional responsibility when needed.)</i>
<input type="radio"/>	<b>Needs Improvement.</b> <i>(Has occasional difficulty responding appropriately to changes, problems and/or dangerous or difficult situations; only occasionally suggests improved work methods or assumes additional responsibility when needed.)</i>
<input type="radio"/>	<b>Unsatisfactory.</b> <i>(Has frequent difficulty responding appropriately to changes, problems and/or difficult or dangerous situations; rarely suggests improved work methods or assumes additional responsibility when needed.)</i>

8. **ATTENDANCE:** Evaluate the employee's attendance considering the work schedule and requirements of the position, including following procedures for requesting and reporting leave. Note that an employee cannot be disciplined for FMLA approved absence(s).

<input type="radio"/>	<b>Meets Expectations.</b> <i>(Attendance is satisfactory; follows procedures for requesting and reporting leave.)</i>
<input type="radio"/>	<b>Needs Improvement.</b> <i>(Attendance needs to improve; occasionally does not follow procedures for requesting and reporting leave; may have unauthorized absences.)</i>
<input type="radio"/>	<b>Unsatisfactory.</b> <i>(Attendance is unsatisfactory; frequently fails to follow procedures for requesting and reporting leave; has unauthorized absences.)</i>

9. **USE & CARE OF EQUIPMENT, MATERIALS & OTHER UNIVERSITY RESOURCES:**  
Evaluate the degree to which the employee uses and/or maintains equipment, materials and other University resources.

<input type="radio"/>	<b>Meets Expectations.</b> <i>(Uses and/or maintains equipment, materials and other University resources appropriately; requests repairs and/or replacement in a timely manner.)</i>
<input type="radio"/>	<b>Needs Improvement.</b> <i>(Needs to improve use and/or maintenance of equipment, materials and other University resources; occasionally needs to be more timely in requesting repairs and/or replacement in a timely manner.)</i>
<input type="radio"/>	<b>Unsatisfactory.</b> <i>(Frequently fails to use and/or maintain equipment, materials and other University resources appropriately; frequently fails to request repairs and/or replacement in a timely manner.)</i>

- 10 **SAFETY:** Evaluate the degree to which the employee follows and promotes work safety rules, practices and instructions.

<input type="radio"/>	<b>Meets Expectations.</b> <i>(Demonstrates an acceptable knowledge of safety rules, practices and instructions; promotes adherence to safety rules; carries out duties in a safe manner; exhibits an appropriate concern for the safety of self and/or others; appropriately anticipates hazards and takes preventative action.)</i>
<input type="radio"/>	<b>Needs Improvement.</b> <i>(Occasionally does not demonstrate an acceptable knowledge of safety rules, practices and instructions; occasionally does not promote adherence to safety rules; occasionally does not carry out duties in a safe manner; occasionally does not exhibit appropriate concern for the safety of self and/or others; occasionally does not appropriately anticipate hazards or take preventative action.)</i>
<input type="radio"/>	<b>Unsatisfactory.</b> <i>(Frequently does not demonstrate an acceptable knowledge of safety rules, practices and instructions; frequently fails to promote adherence to safety rules; frequently does not carry out duties in a safe manner; frequently does not exhibit appropriate concern for the safety of self and/or others; frequently does not appropriately anticipate hazards or take preventative action.)</i>

- 11 **SERVICE:** Evaluate the employee's service to PSU, the community and professional organizations through activities such as campus committees, community volunteerism, professional organization memberships and conference attendance.

<input type="radio"/>	<b>Meets or Exceeds Expectations.</b> <i>(Participates in PSU, community and/or professional service-related activities as appropriate for this position.)</i>
<input type="radio"/>	<b>Needs Improvement.</b> <i>(Needs to engage more in PSU, community and/or professional service-related activities as appropriate for this position.)</i>
<input type="radio"/>	<b>Unsatisfactory.</b> <i>(Has been given the opportunity to engage in PSU, community and/or professional service-related activities but does not participate at a level appropriate for this position.)</i>
<input type="radio"/>	<b>Does Not Apply</b>

- 12 **LEADERSHIP:** (Required for Supervisors only; Optional for Others). Evaluate the employee's ability to lead others and manage resources to ensure the mission and goals of the department or work unit are met.

<input type="radio"/>	<b>Meets or Exceeds Expectations.</b> <i>(Effectively plans, organizes, directs, oversees and/or evaluates the work of others; inspires positive morale; effectively manages resources; rarely needs supervisory intervention.)</i>
<input type="radio"/>	<b>Needs Improvement.</b> <i>(Occasionally needs to increase effectiveness in planning, organizing, directing, overseeing and/or evaluating the work of others; occasionally needs to increase effectiveness in managing resources; occasionally needs more than routine supervisory intervention.)</i>
<input type="radio"/>	<b>Unsatisfactory.</b> <i>(Frequently ineffective in planning, organizing, directing, overseeing and/or evaluating the work of others; frequently ineffective in managing resources; frequently needs supervisory intervention.)</i>
<input type="radio"/>	<b>Does Not Apply</b>