|  |  |  |  |
| --- | --- | --- | --- |
| Employee Name        | Job Title & Department      | Evaluation Period      | Time in Position      |
| Supervisor Name & Title      | Dual Report Supervisor Name & Title      |

|  |  |  |  |
| --- | --- | --- | --- |
| **Unsatisfactory** | **Needs Improvement** | **Met/Exceeded Expectations** | **Exceptional** |
| Performance was below expectations in essential areas of responsibility, with key goals and objectives missed. Contribution was typically below that of peers or incumbents in comparable positions. | Performance often met, but did not consistently meet, position expectations. One (or more) of the most critical annual objectives was not met. Incumbent typically needs further coaching and development to fully meet position expectations. | Performance consistently met or exceeded Yale’s high standards and expectations. All critical annual goals were achieved. Incumbent widely recognized as a strong and valued contributor. | Performance noticeably exceeded expectations and made a unique contribution to the achievement of University, School, or Departmental objectives. This rating is awarded to under 20% of Yale incumbents and is typically reserved for the top performer(s) for the year.  |

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| **SOM acknowledges the following competencies as critical to achieving its mission of educating leaders for business and society:** |
| **Customer Service Focus** | Listening carefully to and understanding customers’ needs and proactively responding to those needs in a consistent and timely manner. |
| **Teamwork and Communication** | Working cooperatively to achieve common goals. Support cooperation, collaboration, and the sharing of information. Serves as a positive colleague or team member. |
| **Product Excellence** | Provide the best quality product available and continuously upgrade standards to maintain quality. |
| **Leadership** | Provide direction and motivation to others through communication, modeling appropriate behavior, optimism and high achievement. |
| **Innovation** | Openness to new ideas and their implementation. Ability to react and adapt to changing situations appropriately. |
| **Strategic Thinking** | Recognize opportunities, identify critical, high pay-off activities, and prioritize them to attain goals. |

**\*NOTE: Please circle the rating: (3), or (3+) if appropriate, to reflect performance gradations within the Met/Exceeded Expectations category**.

| **Section 1: Overall Performance for the Year**Include how results were achieved (i.e., Leadership, Teamwork, etc.) | **Rating** |
| --- | --- |
| *Staff member to submit self-assessment summary here.* *Manager to insert performance review summary here.*  | **4** | Exceptional |
| **3** | **3+** | Met/Exceeded Expectations\* |
| **2** | Needs Improvement |
| **1** | Unsatisfactory |
|  |  |

| **Section 2: Key Accountabilities & Goals** | **Mid-Cycle Status** | **Year-End Results** | **Rating** |
| --- | --- | --- | --- |
| 1 |  |  | **4** | Exceptional |
| **3** | **3+** | Met/Exceeded Expectations\* |
| **2** | Needs Improvement |
| **1** | Unsatisfactory |
|  |  |
| 2 |  |  | **4** | Exceptional |
| **3** | **3+** | Met/Exceeded Expectations\* |
| **2** | Needs Improvement |
| **1** | Unsatisfactory |
|  |  |
| 3 |  |  | **4** | Exceptional |
| **3** | **3+** | Met/Exceeded Expectations\* |
| **2** | Needs Improvement |
| **1** | Unsatisfactory |
|  |  |
| 4 |  |  | **4** | Exceptional |
| **3** | **3+** | Met/Exceeded Expectations\* |
| **2** | Needs Improvement |
| **1** | Unsatisfactory |
|  |  |
| 5 |  |  | **4** | Exceptional |
| **3** | **3+** | Met/Exceeded Expectations\* |
| **2** | Needs Improvement |
| **1** | Unsatisfactory |
|  |  |

| **Next Year’s Goals** |  |
| --- | --- |

| **Employee Comments** |  |
| --- | --- |
| **Manager Signature** |  | **Date** |  |
| **Dual Report Manager Signature** |  | **Date** |  |
| *(if applicable)***Second Level Review Signature** |  | **Date** |  |
| **Employee Signature** |  | **Date** |  |
| *Your signature on this form acknowledges that you have read the information and your supervisor has reviewed it with you.* |

***Important Note:*** *In accordance with CT State Law, you have the right, should you disagree with any of the information contained in this document to submit a written statement explaining your position. This statement will be maintained as part of your personnel file. Once signed and completed, a copy of this form, along with any attachments, should be sent to your HR Generalist.*