



## Office of People Relations

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# Employee Performance Evaluation and Planning Form

EMPLOYEE INFORMATION		
Name: Click to enter text.	Title: Click to enter text.	Started NMSU: Click to enter text.
Aggie ID: Click to enter text.	Department: Click to enter text.	Started Position: Click to enter text.
EVALUATOR INFORMATION		
Name/Aggie ID: Click to enter text.	Department: Click to enter text.	

**Purpose and Instructions: All Annual Performance Evaluations must be completed and routed electronically online during the Annual Evaluation Review Period. Rating of “Unsuccessful”, “Partially Successful”, and “Distinguished” requires Evaluator Comments. This form is only available in this format and outside the electronic system for supervisors who begin documenting performance before or after the annual application is open for use. Examples include an end-of-probation evaluation, an evaluation upon transfer to a different position/department, or an evaluation used in conjunction with a request to extend a probationary period.**

## Evaluation of Past Period Performance

Section 1- Part 1: Categories 1-6	
<b>1. Achievement toward NMSU Goals Unit &amp; NMSU – (Optional for employees who began employment after 07/01/2025: Or eliminate as this could be addressed in “Evaluation of Past Period Performance”, Section 1.)</b>	<b>Rating</b>
Is not aware of the University's goals and objectives.	<input type="checkbox"/> Unsuccessful/Unacceptable Performance
May not fully understand the University's goals and objectives or how their job aligns with them.	<input type="checkbox"/> Partially Successful Performance/Needs Improvement
Demonstrates knowledge necessary to perform the functions of the job.	<input type="checkbox"/> Successful/Effective Performance
Aligns priorities and work with the broader goals; seeks alternatives and broad input; works to impact progress toward goals and objectives.	<input type="checkbox"/> Superior/Highly Effective Performance
Work has a significant impact and progress toward goals and objectives.	<input type="checkbox"/> Distinguished Performance and Role Model Status
Evaluator Comments:	
<b>2. Collaboration and Teamwork</b>	<b>Rating</b>
Performs tasks in isolation; does not share information or expertise with others when needed. Gives little consideration to how decisions impact others.	<input type="checkbox"/> Unsuccessful/Unacceptable Performance
Frequently fails to share information or expertise with others when needed; usually cooperative with direct team members, but does not cooperate with other teams or departments.	<input type="checkbox"/> Partially Successful Performance/Needs Improvement
Communicates openly and respectfully when addressing problems with team members. Shares information and expertise to help achieve goals. Consistently works with others to complete tasks.	<input type="checkbox"/> Successful/Effective Performance
Initiates collaboration and effectively contributes to team performance and morale, even during periods of increased pressure or heavy workload.	<input type="checkbox"/> Superior/Highly Effective Performance
Put team success ahead of personal success. Puts NMSU's success ahead of department or business team success. Coaches less experienced members and motivates them to achieve common goals.	<input type="checkbox"/> Distinguished Performance and Role Model Status
Evaluator Comments: Click to enter text.	

<b>3. Critical Thinking and Problem Solving</b>	<b>Rating</b>
Occasionally exhibits poor judgment or has difficulty making routine decisions.	<input type="checkbox"/> Unsuccessful/Unacceptable Performance
May exhibit poor judgment or fail to bring concerns to a higher authority when appropriate.	<input type="checkbox"/> Partially Successful Performance/Needs Improvement
Demonstrates good judgment in resolving routine problems; brings concerns to a higher authority when appropriate.	<input type="checkbox"/> Successful/Effective Performance
Uses sound judgement and effective use of resources in resolving problems; demonstrates a good understanding of the larger issues related to the problem or concern.	<input type="checkbox"/> Superior/Highly Effective Performance
Makes effective decisions and recommendations; demonstrates and ability to understand and approach a problem from various viewpoints. Takes appropriate initiatives in trying to resolve problems.	<input type="checkbox"/> Distinguished Performance and Role Model Status
Evaluator Comments: Click to enter text.	
<b>4. Interpersonal Effectiveness</b>	<b>Rating</b>
Appears unprofessional or negative while interacting with others; shows insensitivity or disrespect to others.	<input type="checkbox"/> Unsuccessful/Unacceptable Performance
Interactions occasionally seem negative or unprofessional; sometimes appear insensitive or disrespectful to others.	<input type="checkbox"/> Partially Successful Performance/Needs Improvement
Consistently communicates with others in a professional, pleasant, and cooperative manner; works effectively with co-workers and others.	<input type="checkbox"/> Successful/Effective Performance
Regularly demonstrates willingness to compromise and is understanding of others' viewpoints.	<input type="checkbox"/> Superior/Highly Effective Performance
Extremely professional and positive in communications and working relationships with all constituents.	<input type="checkbox"/> Distinguished Performance and Role Model Status
Evaluator Comments: Click to enter text.	
<b>5. Job Mastery</b>	<b>Rating</b>
Demonstrates insufficient understanding of the job and/or its purpose or impact on others.	<input type="checkbox"/> Unsuccessful/Unacceptable Performance
Demonstrates limited understanding of the job and/or its purpose or impact on others; inconsistent application of knowledge.	<input type="checkbox"/> Partially Successful Performance/Needs Improvement
Demonstrates knowledge and skills necessary to perform the functions of the job.	<input type="checkbox"/> Successful/Effective Performance
Displays solid job knowledge; contributes to the goals and mission of the department/organizational unit.	<input type="checkbox"/> Superior/Highly Effective Performance
Extremely knowledgeable; respected as a valuable resource; consistently contributes to the department's and organizational unit's mission.	<input type="checkbox"/> Distinguished Performance and Role Model Status
Evaluator Comments: Click to enter text.	
<b>6. Organizational Awareness</b>	<b>Rating</b>
Unfamiliar with key decision makers and contacts; does not understand or operate effectively within the programs, policies, procedures, rules, and regulations of the University.	<input type="checkbox"/> Unsuccessful/Unacceptable Performance
Does not always demonstrate a full understanding of the University's processes and procedures; is still learning how to find policies, important contacts, and services.	<input type="checkbox"/> Partially Successful Performance/Needs Improvement
Effectively uses both formal and informal channels or networks for acquiring information, assistance, and accomplishing work goals. Ensures due diligence by keeping informed of the University's business and operational plans, policies, and practices.	<input type="checkbox"/> Successful/Effective Performance
Identifies key decision makers and influencers and is highly effective in using networks for accomplishing work goals. Proactively stays informed of policy and processes and communicates this information to others. Supports the changing culture and methods of operating, if necessary, for the success of the University.	<input type="checkbox"/> Superior/Highly Effective Performance
Demonstrates in-depth knowledge of the University's mission and functions, and how its social, political, cultural, and technological systems work and operate highly effectively within them. Leads efforts and effectively manages change in culture and methods of operating for the success of the University.	<input type="checkbox"/> Distinguished Performance and Role Model Status

## Section 1- Part 2: Categories 7-11

7. Resource Management	Rating
Demonstrates a lack of attention to resource management, or excessive attention, which may hinder the quality or productivity of the department. Demonstrates unwillingness to improve process efficiency.	<input type="checkbox"/> Unsuccessful/Unacceptable Performance
Occasionally demonstrates inadequate or inappropriate attention to resource management (either inattention or excessive attention). Demonstrates reluctance to improve process efficiency.	<input type="checkbox"/> Partially Successful Performance/Needs Improvement
Is knowledgeable about equipment, materials, processes, and other available resources. Operates within budgetary constraints and focuses on efficient processes and productivity.	<input type="checkbox"/> Successful/Effective Performance
Frequently seeks enhancements that will improve productivity and effectively balances operating needs with budgetary constraints.	<input type="checkbox"/> Superior/Highly Effective Performance
Maintains significant and up-to-date knowledge about available resources; continually seeks improvements and efficiency, as well as constructive cost efficiencies.	<input type="checkbox"/> Distinguished Performance and Role Model Status
Evaluator Comments: Click to enter text.	
8. Results Orientation and Execution	Rating
Often lags behind, has a backlog of work, or produces less than expected.	<input type="checkbox"/> Unsuccessful/Unacceptable Performance
Inconsistent in the volume of work produced and/or regularly produces somewhat less than expected.	<input type="checkbox"/> Partially Successful Performance/Needs Improvement
Completes the expected amount of work.	<input type="checkbox"/> Successful/Effective Performance
Completes regular assignments efficiently and is able to produce more than expected.	<input type="checkbox"/> Superior/Highly Effective Performance
Completes an impressive volume of work; continually seeks new ways of gaining efficiency.	<input type="checkbox"/> Distinguished Performance and Role Model Status
Evaluator Comments: Click to enter text.	
9. Self-Awareness and Accountability	Rating
Often needs guidance, direction or reminders regarding work; fails to act on current opportunities to improve work processes.	<input type="checkbox"/> Unsuccessful/Unacceptable Performance
Occasionally fails to follow through on tasks or seek necessary guidance; resists acting on current opportunities to improve work processes.	<input type="checkbox"/> Partially Successful Performance/Needs Improvement
Follows through to meet schedules, goals or deadlines with minimal supervision. Appropriately seeks guidance when necessary.	<input type="checkbox"/> Successful/Effective Performance
Completes work independently; rarely needs reminders or guidance to complete regular tasks; seeks additional skill, information, etc. to ensure high quality.	<input type="checkbox"/> Superior/Highly Effective Performance
Takes responsibility for all aspects of job; exhibits creativity and self-initiative in seeking out improvements or enhancements to work.	<input type="checkbox"/> Distinguished Performance and Role Model Status
Evaluator Comments: Click to enter text.	
10. Service and Quality Focus	Rating
Errors or omissions are often evident; work frequently needs to be corrected, redone, or double-checked. Fails to recognize the importance of service. Consistently shows a lack of concern and courtesy. Fails to offer assistance in response to customer service needs.	<input type="checkbox"/> Unsuccessful/Unacceptable Performance
Errors and omissions occur more often than is acceptable; inconsistent quality of work. Occasionally demonstrates a lack of concern and courtesy; inconsistent in demonstrating responsiveness to customer needs.	<input type="checkbox"/> Partially Successful Performance/Needs Improvement
Is usually accurate and thorough in performance of duties; demonstrates concern for quality.	<input type="checkbox"/> Successful/Effective Performance
Consistently demonstrates concern and courtesy. Regularly demonstrates an understanding of the issues and service needs of the customer.	
Makes an extra effort to ensure that work is of the proper quality; checks for accuracy if needed. Actively seeks opportunities to provide quality service. Effectively identifies service needs and responds appropriately.	<input type="checkbox"/> Superior/Highly Effective Performance

Work is of high quality; errors or omissions are extraordinarily rare. Extremely professional and positive in providing service even when dealing with difficult situations. Teaches or demonstrates to others how to deal effectively and positively with customer service needs.	<input type="checkbox"/> Distinguished Performance and Role Model Status												
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## ***Evaluation of Past Period Performance***

### ***Section 1- Part 3: Assessment of Achievement of Goals***

**Instructions:** Supervisor should rate all of the goals in Section 1C. If goals were established, enter them below. If last year's goals do not apply (such as an employee moving departments), you may enter only new or relevant goals that were established.

#### **Goal 1:**

**Objective and Measurement:** Click to enter text.

**Evaluator Comments:** Click to enter text.

#### **Rating:**

- Unsuccessful/Unacceptable Performance
- Partially Successful Performance/Needs Improvement
- Successful/Effective Performance
- Superior/Highly Effective Performance
- Distinguished Performance and Role Model Status
- Deferred
- Cancelled

## Overall Evaluation Rating

Total Score and Rating Information			
<b>TOTAL EVALUATION SCORE:</b> _____			
<b>SCORE ASSIGNMENT</b> Unsuccessful= 2 points Partially Successful= 4 points Successful= 6 points Superior= 8 points Distinguished= 10 points Deferred= 0 points (not factored into overall score) Cancelled= 0 points (not factored into overall score)	<b>Calculation</b> (Double Click for Calculations)		<b>RATING SCALE FOR OVERALL SCORE</b> 01.00-02.55 = Unsuccessful/Unacceptable Performance 02.56-04.55= Partially Successful/Needs Improvement 04.56-06.55= Successful/Effective Performance 06.56-08.55= Superior/Highly Effective Performance 08.56-10.00= Distinguished Performance and Role Model Status
	Section 1, Part 1: Enter Score		
	Section 1, Part 2: Enter Score		
	Section 1, Part 3: Enter Score		
	Total points:	0	
	Total Points	Enter Total Categories	
0		#DIV/0!	

## Planning for the Year Ahead

### Section 2- Part 1: Goals for the Year Ahead

**Instructions:** Goals should be reflective of the primary focus of an individual in support of established department or university goals.

Department/Organization Unit Goals:

Individual Goal 1:

Objective and Measurement: Click to enter text.

Individual Goal 2:

Objective and Measurement: Click to enter text.

Individual Goal 3:

Objective and Measurement: Click to enter text.

## Planning for the Year Ahead

### Section 2- Part 3: Areas for Improvement

Required if Overall Evaluation Score is 4.55 or lower. Optional if score is 4.56 or above, although recommended for categories that received a rating of Partially Successful/Needs Improvement or Unsuccessful/Unacceptable.  
Identify the areas of skill or behavior needing improvement to perform the current job.

#### Area for Improvement 1:

Describe Improvement Activities: Click to enter text.

#### Area for Improvement 2:

Describe Improvement Activities: Click to enter text.

#### Follow-up date to review Progress: Click to enter text.

## Acknowledgements

### Acknowledgements and Comments

Signature denotes that you have discussed, read, and understand all the comments on this Performance Evaluation and Planning form. Your signature does not imply that you entirely agree or disagree with the comments given.

#### Evaluating Supervisor Signature:

Comments: Click to enter text.

#### Employee:

Comments: Click to enter text.