



Provisional Performance Evaluation Form

Employee Name:

Title:

Department:

Supervisor:

This evaluation covers the first 6 months of your employment with Loyola University Maryland.

Loyola University Maryland's Performance Evaluation Form is designed to link employee performance to Loyola's mission and values as reflected in the Jesuit tradition and to provide guidance and consistency to the evaluation process. It assists the supervisor in making decisions about employee development, merit increases, promotions and continuing employment. It should be used to summarize and evaluate the employee's overall performance for the past year, to establish results to be achieved for specific tasks or projects for the next year, and to identify professional development goals to enable the employee to enhance performance in his/her current position or to prepare him/her for future growth.

Procedures

1. Human Resources initiates the form in Halogen. Supervisors should review expectations and goals with new employee.
2. Approaching the deadline, the supervisor prepares a provisional evaluation for the employee and creates new goals for annual performance evaluation. Supervisors will receive a notification 21 days prior to the anniversary date.
3. The second level supervisor approves the evaluation.
4. Human Resources Partner reviews the evaluation in Halogen.
5. The supervisor discusses the provisional evaluation with the employee. Supervisor should also review any new goals and the competencies for the upcoming year. Supervisors can access the annual form for this conversation on the HR website at <https://www.loyola.edu/departments/hr/compensation/performance>
6. The employee adds comments and signs-off .
7. The supervisor signs-off.

Questions regarding Loyola's performance management process can be addressed to Human Resources at performancereview@loyola.edu or by calling 410-617-2354.

Performance Levels

For provisional evaluations, scores are meets expectations or does not meet expectations. However, supervisors should discuss the 1-5 rating scale to be used in the future. Select the rating that best describes performance of job duties in relationship to the job description and for each competency.

MEETS EXPECTATIONS (M): Meets all relevant performance standards.

DOES NOT MEET EXPECTATIONS (D): Does not meet relevant performance standards.

Job Description

Job Duties

Please rate the employee's performance of job responsibilities for the review period. These should include the major responsibilities from the employee's position description as well as any other duties assigned.

- Meets Expectations
- Does Not Meet Expectations



Job Description Comments

Please provide comments describing the performance of job duties during provisional period including strengths and areas for improvement. Include other comments as appropriate.

Job Description Comments



Core Competencies

Select a rating for the performance level demonstrated by the employee during the review period for the following competencies.

Core Competencies

Competency	Rating		
	M	D	N/A
Cross-Cultural Sensitivity Demonstrates an awareness of, and sensitivity to, the needs and concerns of individuals from different cultures. Makes adjustments in ways they are communicating out of respect for cultural differences and minimizes the number of cross-cultural misunderstandings. This is quite different from those individuals who invest little or no time attempting to understand cultural differences and whose efforts to communicate across cultures often leads to misunderstandings.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Productivity/Quality Has established a track record of producing work that is highly accurate, that meets or exceeds productivity standards that have been established for their organizational level or position. Demonstrates attention to detail and reflects well on the organization. Has successfully combined skills, ability and effort level to ensure that expectations related to results/output are achieved. Is personally committed to high quality work and encourages others to have similar standards. This differs from those who cannot be relied upon to produce high quality work, pay little attention to detail, show little pride in a job well done and/or set a poor example for co-workers. These individuals fail to meet standards due to a shortfall in essential skills, ability or the level of energy/effort required.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

<p>Dependability Makes and fulfills commitments. Has established a pattern of working independently, meeting reasonable deadlines, and accepting responsibility for their actions. Willingly makes promises and fully intends to keep them. Arrives at work on time and ready to contribute. Shows up for meetings well-prepared. This contrasts with individuals who have proven to be unreliable when others have counted on them to show up on time, meet deadlines and expectations, or arrive prepared and ready to contribute.</p>	○	○	○
<p>Relationship Building / Customer Focus Builds rapport and develops alliances with a broad range of people. Demonstrates customers are a high priority. Adjusts communication style to meet the needs of individuals and clients at various organizational levels and responds to them in a timely and effective manner. Forms alliances by demonstrating concern and respect for others, as well as by highlighting common interests and aspirations. Leaves others feeling that they will be a trusted ally and is careful to act in ways that reinforce that trust over time. Anticipates and prevents delays or other things that can adversely affect the customer. Keeps customers informed about the status of pending actions and inquiries about customer satisfaction with products or services. This is in contrast with the behavior of individuals who tend to interact with a relatively narrow range of people or who fail to adjust their communication styles to accommodate others and tend to disappoint customers. It is also quite different than behavior that leaves the impression that the person is seeking to advance their own narrow agendas and interests and, leave them feeling forgotten and unimportant or that otherwise result in unmet needs or expectations.</p>	○	○	○
<p>Communication Communicates effectively and appropriately. Uses good judgment as to what to communicate to whom as well as the best way to get that accomplished. Speaks in a clear and credible manner, selecting the right tone for the situation and audience. Listens to others and allows them to make their point. This is quite different than those who tend to select the wrong means of communicating, or who communicate information to inappropriate people. It also contrasts with those whose messages are not clear or lack credibility, as well as those who demonstrate poor listening skills and are unreceptive to feedback.</p>	○	○	○
<p>Initiative Recognizes opportunities and initiates actions to capitalize on them. Looks for new and productive ways to make an impact. Demonstrates this characteristic when it comes to generating new ideas or processes, capitalizing on new business opportunities, seeking out and taking on increasing responsibility or resolving problems as they occur. Uses sound judgment about when to take action and when to seek guidance or permission. This is in contrast to those who fail to notice opportunities, wait to be asked or instructed before taking action, seldom offer new ideas or express reservations about taking on additional responsibilities.</p>	○	○	○
<p>Analytical Thinking Breaks down problems and issues into sub-components and then assesses the costs, benefits and risks of various options prior to selecting a particular approach. This contrasts with the behavior of individuals who tend to attack problems without a thorough examination of all important components and ramifications; who fail to weigh the costs, benefits and risks associated with various alternatives; and/or who are unable to explain or justify their decisions in a logical and systematic fashion.</p>	○	○	○



Competencies Comments

Please provide comments on any strengths or weaknesses demonstrated. Include other comments as appropriate.

Competencies Comments



Professional/Service Development Plan

Supervisors and employees should use this section to plan for activities that:

- develop professional skills and competencies
- allow for participation in service and mission related programs
- address career development goals and aspirations

Please refer to the [Mission and Community Service Leave policy](#) for ideas on how to incorporate these activities into the annual planning.

Professional/Service Development Plan



Title:

 [Add Development Plan](#)



New Goals

Identify a minimum of two new objectives. These objectives should be attainable:

Goals are specific assignments to participate in or manage ongoing or future projects. When setting project oriented goals, outline the scope of the role the employee is to play, lists resources and completion time frame and define the desired result.

Retain a copy of the new goals. New Goals will not automatically transfer from the Provisional Performance form to the Annual Performance review form. New Goals will have to be added manually to the Annual Performance.

Supervisors - Please remember to discuss mission, vision and values as part of your goal setting conversation.

Enter additional goals by clicking on the "Add New" button.

Goals



Title:



Title:

 [Add New Goal](#)



Comments

This section is for optional comments.

Supervisor Comments:



Second Level Supervisor Comments



Employee Comments:



Provisional Overall Assessment

The status checked below will be effective:

- Regular (as defined in the Staff and Administrator policy manual)
- Request for extension of the provisional period. Extensions should be no more than 30 days.



Provision extensions will be monitored by Human Resources and the next review will be conducted outside of Halogen.

(Please contact Loyola University Human Resources at 410-617-2354 if you would like to process a Dismissal for the employee.)