

Conducting your evaluations:

1. You will evaluate the trainee's performance 5 times during the first year of employment at 1, 3, 6, 9, and 12 months post hire. One set of forms are available for each rating period. Please complete each set and return to the Management Foundations Program office.
2. **Reference the Early Professional Competency Model to complete your review; in it you will find detailed examples of behaviors across all levels of performance. To inform your ratings, refer to the Professional Development Plan and input from coaches and managers.**
3. You will indicate your rating of *Exceeds Expectations*, *Meets Expectations*, or *Needs Development* for each of the seven competencies being reviewed. **Note:** If you have not observed how this person performed on a given competency, or if the competency is not relevant to the position you are rating, enter a rating of *Not Observed*.
4. Next to each competency are examples of behaviors that are indicative of performance at the *Meets Expectations* level. These are provided as reference points for evaluating performance. Performance substantially above the *Meets Expectations* level should be rated *Exceeds Expectations*, while performance below the *Meets Expectations* level should be rated *Needs Development*.
5. **Note:** If a trainee is rated as *Needs Development* for two or more consecutive evaluation intervals, please contact the MFP office for details related to development opportunities.

COMPETENCY RATING DEFINITIONS

Exceeds Expectations	Meets Expectations	Needs Development	Not Observed
Consistently meets and sometimes exceeds expectations and/or goals.	Frequently meets expectations and/or goals. Minor development may be required.	Consistently fails to meet expectations and/or goals. Significant development is required.	Insufficient behavior observed during the review period to form a clear understanding of job results or development needs.

COMPETENCY	EXAMPLES OF THE MEETS EXPECTATION PERFORMANCE LEVEL
Business Knowledge	<ul style="list-style-type: none"> ■ Demonstrates satisfactory level of capability in most technical areas. ■ Demonstrates proficiency in most of the crucial skills and knowledge relevant to one's own function or work group. ■ Recognized as knowledgeable by others for functional knowledge and skills.
Critical Thinking and Problem Solving	<ul style="list-style-type: none"> ■ Distinguishes relevant from irrelevant information. ■ Draws conclusions only after analyzing the problem. ■ Makes most decisions in a timely manner. ■ Decisions are based upon relevant information.
Service Focus	<ul style="list-style-type: none"> ■ Normally greets others promptly and respectfully. ■ Most often is courteous, responsive, prompt, polite and respectful when interacting with colleagues and customers. ■ Considers and suggests changes to improve interactions with coworkers and customers.
Collaboration and Teamwork	<ul style="list-style-type: none"> ■ Generally works with others to accomplish goals and tasks, although tends to complete projects individually. ■ At times has difficulty working well with others who have different viewpoints or perspectives. ■ Often attends and participates in meetings, activities and events.
Communication	<ul style="list-style-type: none"> ■ Often expresses thoughts clearly, whether orally or in writing. ■ Normally gives and receives helpful and timely feedback. ■ Considers audience and individual needs when developing communication materials.
Growth Orientation	<ul style="list-style-type: none"> ■ Takes advantage of learning opportunities when they are readily available. ■ Accepts feedback from co-workers and customers and applies it to improve his/her skill set. ■ Willing to take on varied work projects to build skill set.
Professionalism	<ul style="list-style-type: none"> ■ Generally meets established goals on a consistent basis. ■ Works around typical problems and obstacles to obtain results. ■ Work results delivered meet stated needs and are complete, accurate and of good quality. ■ Takes responsibility and stays focused on problems until an effective solution can be found.

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EVALUATION INTERVAL (CHECK ONE):

1 Month post hire
 3 Months post hire
 6 Months post hire
 9 Months post hire
 12 Months post hire

Trainee's Name (<i>First, MI, Last</i>)			EIN	Position Title
Office			Trainee's Signature	
Appointment Date	Probationary Period Ends	Date Initial Expectations Discussed	Manager's Signature	

Evaluator Instructions:

1. On this form, you will evaluate the trainee's performance for the evaluation interval selected above and identify the goals for the subsequent evaluation interval.
2. Please complete both pages of this evaluation form and return to the Management Foundations Program office.
3. You will indicate your ratings of *Exceeds Expectations*, *Meets Expectations*, or *Needs Development* for each of the seven competencies being reviewed. **Note:** If you have not observed how this person performed on a given competency, or if the competency is not relevant to the position you are rating, enter a rating of *Not Observed*.
4. It is expected that you complete your evaluation in a timely manner. Once completed, you should discuss your evaluation with your trainee and obtain their feedback. This discussion should be made within one week of completing the trainee's evaluation.
5. Complete and return this evaluation form to the Management Foundations Program office for inclusion in the eOPF. Please retain a copy for your records.

EVALUATION DUE DATE	EVALUATION DISCUSSION DATE	TRAINEE'S INITIALS	MANAGER'S INITIALS

TRAINEE EVALUATION

Competency	Exceeds Expectations	Meets Expectations	Needs Development	Not Observed
Business Knowledge	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Critical Thinking and Problem Solving	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service Focus	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Collaboration and Teamwork	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Growth Orientation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Professionalism	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

EVALUATION INTERVAL (CHECK ONE):

- 1 Month post hire 3 Months post hire 6 Months post hire 9 Months post hire 12 Months post hire

Goals of the current evaluation interval:

Outcomes of the current evaluation interval:

Goals for the next evaluation interval:

Evaluator's Signature

Trainee's Signature (*Signature does not indicate agreement*)

Date

Date

Do you recommend this person for retention?

- YES
 NO Include rationale identifying specific performance and behavior that support your recommendation.