

# Elevate Samford

## Annual Performance Review - Non-Supervisory

### Employee Information

<b>Employee Name:</b>				<b>SUID:</b>
<b>Position Title:</b>				
<b>Department:</b>				
<b>Supervisor Name:</b>				<b>SUID:</b>
<b>Performance Period (Evaluation from date to date):</b>				
<b>Time in Position</b>	<b>Years:</b>	<b>Months:</b>	<b>Position #:</b>	
<b>Review Date:</b>				

### Performance Rating Scale

*Please rate the employee on each performance factor based on the statements provided. For ratings BE or CE, please use the "Comments" section to explain the rating. If the performance factor is not relevant to the employee's position, use the rating N/A. Select TR if performance concerns exist but BBO documentation is insufficient to support a BE rating. Please list any additional assessments under each category and attach additional sheets or documentation if necessary.*

BE	ID	CC	HE	CE
Below Expectations	Inconsistent/Developing	Competent & Consistent	Highly Effective	Consistently Exceptional
Rarely meets expectations.  See BBO documentation.	May reflect an employee who is new to the role or demonstrates occasional inconsistency.  See BBO documentation.	Performance fully meets expectations and requirements on a consistent basis.  See BBO documentation.	Performance frequently exceeds requirements with minimal direction. Performs tasks and/or functions consistently in a timely manner at a very high-quality level.  See BBO documentation.	Exemplifies the highest standard of professionalism and respect. Demonstrates mastery of their job responsibilities.  See BBO documentation.

#### TR – Transitional Rating

When To Use TR	When <u>Not</u> To Use TR
<ul style="list-style-type: none"> <li>Performance concerns have been observed but BBOs have not yet been formally documented</li> <li>An employee is struggling to meet expectations, but the performance concern is recent and lacks adequate formal documentation to support a lower rating</li> <li>Informal feedback from colleagues or stakeholders suggests performance concerns, but the employee has not yet had a formal conversation to address the issues and understand expectations</li> </ul>	<ul style="list-style-type: none"> <li>An employee is consistently meeting or exceeding expectations and no genuine performance concerns exist. (Use CC, HE, or CE if performance warrants it.)</li> <li>Sufficient BBOs and documentation already exist to support a specific rating—BE, ID, CC, HE, or CE. (Use the rating the evidence supports; TR is only for when concerns exist, but documentation is insufficient.)</li> <li>The supervisor simply prefers to avoid a difficult rating conversation</li> </ul>

## C.A.R.E. Framework Section 1: CELEBRATE Achievements

Highlight specific contributions that reflect Samford's mission and values. Recognize strengths and notable accomplishments from this performance period.

## C.A.R.E. Framework Section 2: ASSESS Performance

Evaluate performance using the four core categories.

### Category 1: Mission, Vision, and Values Alignment

Evaluates how effectively the employee models service-oriented actions, communicates with respect and clarity, upholds accountability and stewardship, and exercises sound ethical judgment.

<b>Mission, Vision, &amp; Values Alignment</b>	Demonstrates Christ-centered values through consistent kindness, respect, and care for students, colleagues and constituents in all interactions and communications.	Rating: _____
	Exercises sound ethical judgement in daily practices.	Rating: _____
	Demonstrates commitment to the broader university community as workload allows.	Rating: _____
		Rating: _____
		Rating: _____
<b>Resource Management</b>	Works within budgets to meet operating objectives.	Rating: _____
	Thinks strategically regarding financial management and utilizes university resources effectively to minimize and control expenses.	Rating: _____
	Adheres to purchasing, budgeting, and facility use in compliance with established policies and procedures.	Rating: _____
	Manages work time in an efficient manner aligning with established policies and procedures.	Rating: _____
		Rating: _____
<b>Most Frequent Rating</b>		_____

**Comments - Specific Behavior-Based Observations (BBOs) supporting the above ratings:  
Required for BE and CE ratings**

### Category 2: Job Proficiency

Evaluates competency in core job responsibilities, quality of work, productivity, and ability to perform duties independently.

<b>Essential Job Duties</b>	Demonstrates understanding and competency in essential job duties	Rating: _____
	Works independently with sound judgment and problem-solving and consults with supervisor regarding workload as necessary.	Rating: _____
		Rating: _____
		Rating: _____
		Rating: _____
<b>Planning &amp; Productivity</b>	Produces accurate, timely work that consistently meets quality standards and deadlines	Rating: _____
	Organizes and prioritizes appropriately.	Rating: _____
	Demonstrates an understanding of concepts, methods, techniques and principles necessary to accomplish job duties.	Rating: _____
		Rating: _____
		Rating: _____
<b>Communication</b>	Gives others appropriate attention, seeks clarification when needed, and responds thoughtfully.	Rating: _____
	Receives feedback with openness and offers feedback respectfully and constructively.	Rating: _____
	Develops written communication (emails, reports, etc.) that is clear, concise, accurate, and complete.	Rating: _____
		Rating: _____
		Rating: _____
<b>Most Frequent Rating</b>		_____

**Specific Behavior-Based Observations (BBOs) supporting the above ratings:**

**Required for BE and CE ratings**

### Category 3: University & Departmental Impact

*Evaluates teamwork, reliability, communication, and contribution to a respectful, collaborative work environment.*

<b>Support of University Policies &amp; Procedures</b>	Demonstrates a clear understanding of, and consistently follows, the university policies, procedures, and applicable federal and state laws and regulations relevant to their role and responsibilities.	Rating: _____
	Consistently practices and promotes a safe working environment in compliance with the employee safety guidelines.	Rating: _____
	Completed required university commitments form and required training timely.	Rating: _____
		Rating: _____
		Rating: _____
<b>Teamwork &amp; Department Contribution</b>	Demonstrates dependability, professionalism, and effective collaboration	Rating: _____
	Responds to internal and external customers in a courteous, timely, and professional manner, while providing excellent service that supports a positive experience.	Rating: _____
	Helps to de-escalate disrespectful situations or informs leadership of conflicts as appropriate.	Rating: _____
		Rating: _____
		Rating: _____
<b>Respectful Workplace</b>	Contributes to a welcoming workplace where others feel safe, respected, valued, and connected through consistent professionalism, kindness, and consideration in daily interactions.	Rating: _____
	Understands and is responsive to differences in communication styles based on cultural or other factors.	Rating: _____
		Rating: _____
		Rating: _____
		Rating: _____
<b>Most Frequent Rating</b>		_____

**Specific Behavior-Based Observations (BBOs) supporting the above ratings:**

**Required for BE and CE ratings**

### Category 4: Growth and Development

*Evaluates progress toward development goals, engagement in professional development, and accountability for continuous improvement.*

Makes steady progress toward SMART goals and development objectives	Rating: _____
Actively engages in professional development and applies new learning	Rating: _____
Takes ownership of growth and seeks feedback to strengthen performance	Rating: _____
	Rating: _____
	Rating: _____
<b>Most Frequent Rating</b>	_____

**Specific Behavior-Based Observations (BBOs) supporting the above ratings:**

*Required for BE and CE ratings*

### Overall Performance Rating

For each category, review the ratings selected and identify the rating that appears most often, excluding TR – Transitional Rating, which is not counted for final ratings. Use the four category ratings to determine the overall performance rating.

<input type="checkbox"/> <b>BE</b> Below Expectations	<input type="checkbox"/> <b>ID</b> Inconsistent/Developing	<input type="checkbox"/> <b>CC</b> Competent & Consistent	<input type="checkbox"/> <b>HE</b> Highly Effective	<input type="checkbox"/> <b>CE</b> Consistently Exceptional
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**Additional Supervisor Comments**

## C.A.R.E. Framework Section 3: REFLECT on Progress

*Invite the employee to share what they learned and discuss successes and challenges.*

**Employee should complete the Employee Reflection Form (Annual Review) prior to this meeting.**

**Attach the completed form to this review.**

### Reflecting on This Past Year

**Challenges, Growth, and Lessons Learned:**

Acknowledge employee's reflections; provide supervisor perspective and context

## C.A.R.E. Framework Section 4: EQUIP for Growth

Turn reflection into action.

### SMART Goals for Next Performance Period

These goals will form the foundation of the employee's Individual Development Plan (IDP).

Each goal should be: **Specific** - Clear outcome defined **Measurable** - Progress can be tracked **Achievable** - Realistic given time and resources **Relevant** - Connects to Samford's mission and team priorities **Time-bound** - Clear deadline

Goal #	Specific Goal Description	Measurable: How Progress Tracked	Relevant: Connection to Mission/Priorities/Needs of the Department or University	Support/ Resources Needed	Time-bound: Target Date
1					
2					
3					

<p><b>Employee:</b> Identify specific actions they commit to taking to support their performance, growth, and continued success.</p>	<p><b>Supervisor:</b> Identify specific available support, guidance,resources, or follow-up to support the employee's success.</p>

## Employee Comments

Employees may use this optional section to share comments, reflections, or additional information related to their annual performance review.

## Signatures

*Employee's signature acknowledges receipt of this review. It does not indicate agreement with the contents. Employees may include additional comments or perspective in the Reflect section above.*

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Supervisor Signature Date

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Employee Signature Date

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Next-Level Supervisor or Department Head Signature (if BE or CE selected) Date

**Completed performance review forms should be submitted to Human Resources by email at [hr@samford.edu](mailto:hr@samford.edu). Please ensure all required sections, comments, attachments, and signatures are complete before submitting.**