

**Performance Evaluation Form  
(Non-Instructional Personnel)  
2011-2012**

Date: 06-12-12\_

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Name of Employee: \_\_\_\_\_

Position: Chief Financial Officer Date of Employment: April 1, 2011

Note: A response of "4" or "1" requires an explanation. A "4" requires justification and examples. A "1" requires a remediation plan.

\_\_\_\_\_ I. **Knowledge of Work** (The extent to which the employee demonstrates an understanding of the overall functions and responsibilities of the position.)

**Actual Performance Level**

- 4. \_\_\_\_\_ **Demonstrates exceptional knowledge of job; independently solves problems and makes decisions.**
- 3. \_\_\_\_\_ **Above average knowledge of job; looks for methods to make job more effective and/or efficient.**
- 2. \_\_\_\_\_ **Adequate knowledge of job; sometimes makes improvements in methods of job performance.**
- 1. \_\_\_\_\_ **Less than average knowledge of job; depends largely on others for assistance.**

Comments:

\_\_\_\_\_s many years of experience have made her a reliable financial professional. She has complete understanding of the college's legacy accounting system. It will be imperative that she advance the knowledge and use of the system to be able to provide financial data and reports that can used for not only financial and accounting purposes, but for management of the college as well. She must continue to work on taking the knowledge she has with the legacy system and be able to transfer that into professional, usable reports including EXCEL that assist budget and managers track and make financial decisions.

I know \_\_\_\_\_ will also continue to gain knowledge in the management of the additional areas of facilities and IT assigned to her after here title and class change to CFO.

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\_\_\_\_\_ II. **Quantity of Work** (The extent to which the employee produces a volume of work consistent with established standards.)

**Actual Performance Level**

- 4. \_\_\_\_\_ **Work output consistently and significantly exceeds established requirements.**
- 3. \_\_\_\_\_ **Work output often higher than required.**
- 2. \_\_\_\_\_ **Work output meets requirements; employee keeps up with**

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work schedule.

1. \_\_\_\_\_ Work output is below established level for position.

Comments:

[REDACTED] is responsible for reporting requirements to many agencies and entities.

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III. **Quality of Work** (The extent to which the work the employee does is accurate, thorough, complete and of high quality.)

**Actual Performance Level**

4. \_\_\_\_\_ Work is always or almost always of exceptional quality, completeness, and accuracy.
3. \_\_\_\_\_ Work is generally at high level of quality, accuracy, and completeness.
2. \_\_\_\_\_ Work sometimes fails to meet established standards for quality, accuracy, and completeness.
1. \_\_\_\_\_ Work often fails to meet established standards for quality, accuracy, and completeness.

Comments:

Internal controls must remain a priority [REDACTED] Also, when known issues [REDACTED] are found these issues must be raised. [REDACTED] I feel confident she knows she will be supported now in any area where she feels deficiencies need to be addressed.

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IV. **Punctuality** (The extent to which the employee is on time for work and for meetings, appointments, etc.)

**Actual Performance Level**

4. \_\_\_\_\_ Always or almost always on time for work, meetings, appointments, etc.
3. \_\_\_\_\_ Generally on time for work, meetings, appointments, etc. without being reminded.
2. \_\_\_\_\_ Generally on time for work, meetings, appointments, etc., but

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often needs reminder from supervisor or co-workers.

1. \_\_\_\_\_ Is late for or absent from work meetings, appointments, etc., more often than is acceptable.

Comments: As with many long-term state employees, [REDACTED] has built up many days of leave. She must ensure leave use appropriate for her ranking as a senior level college employee, and that leave use does not interfere with job responsibilities.

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**[REDACTED] V. Initiative** (The extent to which the employee exercises self-reliance and ingenuity on the job.)

**Actual Performance Level**

4. \_\_\_\_\_ Recognizes and assumes additional assignments without being told; shows ability to work independently.
3. \_\_\_\_\_ Functions beyond basic requirements of the job; ordinarily works independently.
2. \_\_\_\_\_ Takes average initiative toward work; often waits for instruction.
1. \_\_\_\_\_ Shows little independence toward work; usually needs to be directed.

Comments:

The move to on-line leave system is an example of the use of technology that must continue.

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**[REDACTED] VI. Cooperation** (The extent to which the employee demonstrates willingness and ability to work well with others.)

**Actual Performance Level**

4. \_\_\_\_\_ Consistently demonstrates exceptional willingness and ability to work well with others.
3. \_\_\_\_\_ Generally works well with others.
2. \_\_\_\_\_ Occasionally demonstrates reluctance or inability to work well with others.
1. \_\_\_\_\_ Frequently demonstrates unwillingness and inability to work

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well with others.

Comments: As a senior manager [REDACTED] needs to ensure she projects a spirit of cooperation, and a respect for the responsibilities of other divisions.

[REDACTED] VII. **Judgment** (The extent to which the employee demonstrates sound thinking regarding job tasks and responsibilities.)

**Actual Performance Level**

- 4. \_\_\_\_\_ **Conclusions always or almost always demonstrate sound judgment; sets examples for others.**
- 3. \_\_\_\_\_ **Conclusions usually appear well thought out regarding both routine and non-routine work.**
- 2. \_\_\_\_\_ **Judgment is usually reliable in normal situations.**
- 1. \_\_\_\_\_ **Actions sometimes indicate lack of sound judgment in even routine situations.**

Comments:

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[REDACTED] VIII. **Planning and Organization** (The extent to which the employee plans and organizes work and activities logically, effectively and efficiently.)

**Actual Performance Level**

- 4. \_\_\_\_\_ **Always or almost always plans and organizes work load in the most effective manner.**
- 3. \_\_\_\_\_ **Generally maintains an effective and efficient work schedule with regard to both routine and non-routine matters.**
- 2. \_\_\_\_\_ **Plans and organizes routine work in a generally acceptable manner.**
- 1. \_\_\_\_\_ **Often fails to organize work in an effective and efficient manner.**

Comments:

Developed campus calendar to keep all divisions and departments informed and coordinated.

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[REDACTED] IX. **Oral Communications** (The extent to which the employee effectively communicates orally.)

**Actual Performance Level**

- 4. \_\_\_\_\_ **Consistently communicates ideas clearly and effectively.**
- 3. \_\_\_\_\_ **Normally expresses ideas clearly and concisely.**
- 2. \_\_\_\_\_ **Usually organizes and expresses thoughts in an acceptable manner.**
- 1. \_\_\_\_\_ **Generally does not express thoughts effectively.**

Comments:

Needs to ensure time is given to thoughtful responses when working with other divisions, [REDACTED]

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[REDACTED] X. **Writing Skills** (The degree of effectiveness with which the employee communicates in writing.)

**Actual Performance Level**

- 4. \_\_\_\_\_ **Demonstrates excellent skills in writing clearly, accurately, and concisely.**
- 3. \_\_\_\_\_ **Demonstrates above-average skills in writing clearly and concisely.**
- 2. \_\_\_\_\_ **Demonstrates average skills in writing effectively.**
- 1. \_\_\_\_\_ **Demonstrates less than average ability to express ideas clearly and effectively in writing.**

Comments:

[REDACTED] is required to write numerous policies and procedures as well as responses and reports to numerous agencies.

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[REDACTED] XI. **Adaptability** (Ability to effectively adapt to changes in work situations, responsibilities, and tasks.)

**Actual Performance Level**

- 4. \_\_\_\_\_ Demonstrates excellent ability to effectively adapt to changes in work situations and job requirements.
- 3. \_\_\_\_\_ Demonstrates above-average ability to adapt to changes in work situations and job requirements.
- 2. \_\_\_\_\_ Demonstrates average ability to adapt to changes in work situations and job requirements.
- 1. \_\_\_\_\_ Demonstrates less than average ability to adapt to changes in work situations and job requirements.

Comments:

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[REDACTED] XII. **Problem-Solving Ability** (Ability to efficiently and effectively solve work-related problems.)

**Actual Performance Level**

- 4. \_\_\_\_\_ Demonstrates excellent problem-solving ability and practices.
- 3. \_\_\_\_\_ Demonstrates above-average ability to effectively solve problems.
- 2. \_\_\_\_\_ Demonstrates average problem-solving ability.
- 1. \_\_\_\_\_ Demonstrates less than average problem-solving skills.

Comments:

[REDACTED] has demonstrated the ability to develop solutions to issues as they arise.

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[REDACTED] XIII. **Professionalism** (The degree to which the employee enhances organizational objectives and projects the appropriate image for his or her position.)

**Actual Performance Level**

- 4. \_\_\_\_\_ **Exceptionally successful in presenting a positive image of professionalism.**
- 3. \_\_\_\_\_ **Consistently projects a high standard of professionalism.**
- 2. \_\_\_\_\_ **Ordinarily projects an image of having professional principles.**
- 1. \_\_\_\_\_ **Usually does not project an image of professionalism.**

**Comments:**

Must ensure that while the CFO is expected to be a position of restraint and financial conservatism, these values must be presented in a positive manner. [REDACTED] is a dedicated and conscientious professional and strives to keep the image and perception of the college positive at all times.

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**XIV. Other**

**A. Strengths**

Years of experience in the Alabama system. One of the college's most supportive advocates.

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**B. Areas Needing Improvement and Development (Response Required)**

Production of data in a manner usable for management and strategic decision making. Continue to learn the intricacies of the facility and IT areas added to her responsibility this fiscal year.

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**C. Recommendations to Bring About Needed Improvement and Development  
(Response Required)**

Facility seminars and peer assistant from DPE facility office. Assistance from Alliant on possible upgrades to financial system.

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[Redacted]  
Average Overall Rating

D. Glen Cannon  
Evaluation prepared by (printed name)

(Note: Current job description must be attached to this document.)

Reviewed by:

D. Glen Cannon  
President

06-13-12  
Date



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This evaluation form has been reviewed by the undersigned employee. The space below is provided for any objection or other comment by the employee pertaining to the contents of this document or to the process by which he/she was evaluated. Another sheet may be attached if necessary.

The employee shall have three (3) working days from his/her review of the contents of this document to file any specific objection to its contents. In the absence of any written comment by the employee, the employee's signature will not be construed to mean that he/she concurs with or objects to the contents of this document. It shall be construed to mean only that the employee has read the evaluation document.

**Employee Comments**

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*I have reviewed the foregoing evaluation and offer the above comments, if any. My signature does not indicate either disagreement or concurrence with the evaluation. It indicates only that I have been given the opportunity to review the evaluation.*

[REDACTED]  
\_\_\_\_\_  
Employee Signature

6/13/12  
\_\_\_\_\_  
Date