Performance Evaluation Model B

Model B (Unclassified) Performance Evaluation

Employee Name: ____________________ Department: ____________________

Date of Current Performance Evaluation: ______________ Performed by: ____________________

Purpose of a Performance Evaluation

- Align employee performance with the mission and goals of the university and unit.
- Strengthen two-way communication regarding job performance and periodically assess goals and opportunities for the unit and the individual.
- Establish a mutually-understood set of performance expectations.
- Recognize contributions of employees.
- Discuss opportunities for growth and development.
- Provide necessary feedback when performance does not meet expectations.

Process

- Employee completes the self-evaluation at least one week prior to the performance evaluation discussion.
- Supervisor/manager reviews the full range of performance over the entire past year and completes all sections of the performance evaluation, following the instructions provided in each section.
- The supervisor/manager meets with the employee to discuss the full range of employee performance, consistent with informal, ongoing performance feedback. Create shared goals and objectives to enhance employee performance and professional development.
- Upon completion of the performance evaluation discussion, the employee and supervisor/manager sign the evaluation.
- The supervisor/manager sends the signed copy to Employee Relations, Terrace Hall Annex.
- A photocopy can be provided to the employee upon request.

Instructions:

- Read the criteria for each competency and mark those that apply to the employee’s performance.
- In the Rating/Assessment of Competencies section, enter your rating and include specific examples and illustrations.
- Select N/A if the competency is not applicable.
- Comments are required when selecting a rating of “approaches expectations” or “unsatisfactory”.
Rating Scale:

**Outstanding (5)**
Objects and standards are clearly and substantially surpassed. Consistently and significantly exceeds all performance expectations and standards. Highest performance level. Demonstrates a personal commitment to a high level of performance and results, even under challenging work goals.

**Exceeds Expectations (4)**
Frequently exceeds job requirements. Makes contributions well beyond job demands. Seizes initiative in development and implementation of challenging work goals. Each project or job is done thoroughly and on time. Thinks beyond details of the job, working toward the overall goals of the component.

**Meets Expectations (3)**
Performance is what is expected of a fully qualified and experienced person in this position. All objectives and standards are met. Consistently meets all performance expectations and standards. Job well done. Errors are minimal and seldom repeated. Prioritizes problems and projects well. Requires normal supervision and follow-up. Almost always completes work or projects on schedule.

**Approaches Expectations (2)**
Objectives and standards are generally met but full results are not totally achieved. Occasionally falls short of consistently meeting performance expectations and standards. Some performance aspects were not met – needs slight improvement. Could result from being newly appointed to the position – continuing to learn all aspects of the position.

**Unsatisfactory (1)**
Objectives and standards are consistently not met. Consistently fails to meet performance expectations. Needs significant improvement. Has been on the job long enough to have shown better performance. Excessive attention by supervisor is required. Does not grasp situation when explained. Corrective action is required.

**NA= Not Applicable**

Does not apply to job performance expectations.

**CORE COMPETENCIES**

I. Job Knowledge:

I-A. Demonstrates knowledge and skills necessary to perform the job effectively

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<th>Outstanding</th>
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I-B. Applies knowledge and skills to critical work issues in a timely manner

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I-C. Demonstrates willingness to learn new skills, methods, processes to enhance job performance

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I-D. Understands the University’s strategic goals, policies, and procedures as related to job responsibilities

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I-E. Uses technology appropriately and efficiently

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</table>
I. Performs the full range of responsibilities and duties associated with the job

- Outstanding
- ExceedsExpectations
- MeetsExpectations
- ApproachesExpectations
- ApproachesExpectations
- Unsatisfactory
- N/A

II. Communication Skills:

II-A. Writes and speaks clearly and accurately

- Outstanding
- ExceedsExpectations
- MeetsExpectations
- ApproachesExpectations
- Unsatisfactory
- N/A

II-B. Encourages collaboration and sharing of information

- Outstanding
- ExceedsExpectations
- MeetsExpectations
- ApproachesExpectations
- Unsatisfactory
- N/A

II-C. Listens well; is responsive to inquiries, directions, and suggestions

- Outstanding
- ExceedsExpectations
- MeetsExpectations
- ApproachesExpectations
- Unsatisfactory
- N/A

II-D. Seeks to understand others' communications

- Outstanding
- ExceedsExpectations
- MeetsExpectations
- ApproachesExpectations
- Unsatisfactory
- N/A

III. Interpersonal Skills, Cooperation, Collaboration:

III-A. Demonstrates effective positive customer/student services.

- Outstanding
- ExceedsExpectations
- MeetsExpectations
- ApproachesExpectations
- Unsatisfactory
- N/A

III-B. Develops and maintains professional working relationships with internal and/or external constituencies

- Outstanding
- ExceedsExpectations
- MeetsExpectations
- ApproachesExpectations
- Unsatisfactory
- N/A

III-C. Makes suggestions to improve the efficiency and effectiveness of the work unit with due concern for others

- Outstanding
- ExceedsExpectations
- MeetsExpectations
- ApproachesExpectations
- Unsatisfactory
- N/A

III-D. Willingness to assume fair share of responsibility without preempting input of others

- Outstanding
- ExceedsExpectations
- MeetsExpectations
- ApproachesExpectations
- Unsatisfactory
- N/A

III-E. Productively participates in meetings

- Outstanding
- ExceedsExpectations
- MeetsExpectations
- ApproachesExpectations
- Unsatisfactory
- N/A

III-F. Accepts responsibility and accountability

- Outstanding
- ExceedsExpectations
- MeetsExpectations
- ApproachesExpectations
- Unsatisfactory
- N/A

IV. Planning, Organizing and Achieving Results:

IV-A. Actively seeks ways to improve work systems

- Outstanding
- ExceedsExpectations
- MeetsExpectations
- ApproachesExpectations
- Unsatisfactory
- N/A

IV-B. Develops goals, plans, and priorities to achieve program objectives
IV. Problem Analysis and Decision Making:

V.A. Anticipates and identifies problems

V.B. Gathers and analyzes appropriate information before making decisions

V.C. Seeks advice from others in situations outside own level of expertise

V.D. Develops and implements effective solutions

VI. Commitment to Diversity:

VI.A. Demonstrates respect for all individuals regardless of their background or culture

VI.B. Participates in processes that promote diversity and equal opportunity

VI.C. Advances Affirmative Action policy and initiatives

SUPERVISOR CORE COMPETENCIES

VII. Fiscal and Human Resource Management:

VII.A. Promotes positive employee relations and teamwork
VII-B. Demonstrates fiscal responsibility and plans and controls expenditures and materials

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VII-C. Utilizes employee skills to meet program objectives while maintaining staff productivity and morale

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VII-D. Makes effective staffing decisions

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VII-E. Manages unit effectively during periods of change

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VII-F. Delegates authority and responsibility appropriately

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VIII. Leadership:

VIII-A. Demonstrates commitment and provides leadership through personal example and professional expertise

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VIII-B. Demonstrates ability to motivate staff to meet program objectives

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VIII-C. Creates a work climate that encourages employee commitment to organizational goals

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VIII-D. Supports an environment of continuous improvement

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VIII-E. Serves on university committees and councils

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VIII-F. Other factor(s) and comments: Manager's Assessment of Competencies. Include Specific examples and illustrations.

IX. Supervision:

IX-A. Demonstrates awareness of equal opportunity and affirmative action

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IX-B. Sets clear goals and expectations for employees

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IX-C. Provides adequate support for employees to complete tasks
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<th>IX-D. Provides informal, ongoing feedback to employees</th>
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<td>Outstanding ☐</td>
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<td>Outstanding ☐</td>
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<tr>
<td>IX-E. Provides formal performance evaluation for employees</td>
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<td>Outstanding ☐</td>
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<tr>
<td>IX-F. Supports the professional development of employees</td>
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X. Other Position-Specific Competency:

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<th>XI. OVERALL EVALUATION RATING:</th>
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<td>XI-A. Select an overall rating for this employee</td>
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<td>Outstanding ☐</td>
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<tr>
<th>XII. A. PRIOR YEAR GOAL(S):</th>
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<tbody>
<tr>
<td>XII-B. Prior Year Goal(s) Outcome/Measure</td>
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<tr>
<td>XII-C. Prior Year Goal(s) Timetable</td>
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<tr>
<td>XII-D. Prior Year Goal(s) Status</td>
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<tr>
<th>XIII. A. GOALS FOR UPCOMING YEAR:</th>
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<tr>
<td>XIII-B. Upcoming Year Goal(s) Expected Outcome/Measure</td>
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<tr>
<td>XIII-C. Upcoming Year Goal(s) Timetable</td>
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<tr>
<td>XIII-D. Upcoming Year Goal(s) Issues/Comments</td>
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Evaluator Comments:

Commented [BJ1]:

Beyond Compliance Training

IMPORTANT Beyond Compliance Message: Annually, two hours of Beyond Compliance training are required of all staff and strongly encouraged for our TT and FTNTT faculty. The deadline to satisfy Beyond Compliance training is the end of the fiscal year, June 30. It is IMPORTANT to note that one of your two annual Beyond Compliance (BC) hours may be a gender-based discrimination or harassment course. The Title IX Training option may be a facilitator-led session. (Visit Beyond Compliance for dates and times) or online. To access the online, self-paced Beyond Compliance sessions, please visit Safe Colleges.

Has this employee completed at least two hours of compliance training in the previous fiscal year?

☐ Yes    ☐ No (Please comment in "Goals for Completion" below)    ☐ In Progress (Please comment in "Goals for Completion" below)

Comments / Goals for Completion

Additional opportunities for development of staff:

The university is strongly encouraging our staff to complete trainings regarding diversity, equity and inclusion. (Visit Diversity Education and Training Lab Offerings). In addition, supervisors should provide opportunities for staff to enhance their job-related knowledge and skill set. It is suggested that these goals be a focus in each performance evaluation period going forward. Trainings may involve facilitator-led sessions, webinars, pre-recorded presentations, and other options. (Visit HR Training & Development Calendar).

1. What specific opportunities have been provided (i.e. trainings your department has organized, requested or supported, etc.) to expand diversity, equity and inclusion capacity/expertise for this staff member?

2. What specific opportunities have been provided (i.e. trainings your department has organized, requested or supported, etc.) to this staff member to enhance their job related knowledge and skill set?

3. What opportunities for promotions might occur over the next three years?
This section is available in the employee self-evaluation form.

SUPPLEMENTAL QUESTIONS:

1. What did you receive from your supervisor that you felt WAS HELPFUL and assisted you in your ability to perform your job effectively?

2. What did you receive from your supervisor that you felt WAS NOT HELPFUL and inhibited your ability to perform your job effectively?

3. What did you NOT receive from your supervisor that you felt would have been helpful in performing your job more effectively?

4. What specific opportunities have you been provided (i.e. trainings your department has organized, requested or supported, etc.) that expanded your diversity, equity and inclusion capacity/expertise?

5. What professional development opportunities would you like your supervisor to provide to enhance your diversity, equity and inclusion expertise/capacity?

6. What specific professional development opportunities have you been provided to enhance your knowledge and job-related skill set?

7. What professional development opportunities would you like your supervisor to provide to enhance your knowledge and job-related skill set?

8. What promotions or alternate assignments/positions might you seek over the next three years?