



Subject Matter Professional Performance Appraisal FY17

Demographics

Name:	<input type="text"/>	Employee ID:	<input type="text"/>
Job Title:	<input type="text"/>	Supervisor:	<input type="text"/>
Department:	<input type="text"/>		

General Instructions

The annual Performance Appraisal is intended to summarize employee performance over the past year and provide an opportunity to plan for coming year. Use the rating scale definitions below to help accurately document performance. Use the comment boxes to provide specific examples that support the rating. A comment must be provided if a rating of "Outstanding" or "Unacceptable" is given.

Rating Scale

Outstanding

Is a role model in the job. Exhibits mastery in all facets of the job. Puts the customer at the center of every activity. Steps outside of existing responsibilities to add value to the University. Identifies breakthrough concepts. Is sought out by colleagues for advice on issues. Models the values of the University on a daily basis. Is in sync with the strategic direction of the University. Is universally regarded by others as a knowledgeable resource and true asset. Acts as a mentor, guide and teacher. Seeks new and improved ways to perform the job. Openly shares information and resources. Actively promotes cooperation, understanding and teambuilding.

Exceeds Expectations

Performance consistently exceeds expectations in specified criteria. Sets and meets challenging professional goals and shows initiative in meeting them. Assumes extra responsibilities and participates in projects often. Proactive in planning, problem solving and initiating solutions within work group. An exceptional contributor to the success of the work group and organization.

Successful

Performance consistently meets expectations in specified criteria. Requires minimal supervision and complies with work rules and regulatory requirements. Performance consistently meets the demands placed upon the position. Reliably completes routine assignments in an accurate and timely fashion. Assumes additional responsibilities when requested or assists in extra project work. Meets the University's high performance standards. Contributes positively to the success of the work group and organization.

Improvement Expected

Performance meets some but not all expectations in specified criteria. Performance requires occasional supervisory intervention. Does not consistently complete job assignments in some areas in an accurate and timely fashion. Performance or behavior causes occasional problems for students, customers, department/unit and/or co-workers.

Unacceptable

Overall performance does not meet expectations in specified criteria. Often requires supervision, redirection and/or re-instruction. Does not consistently complete job assignments in an accurate and timely fashion. Performance or behavior causes problems for students, customers, department/unit and/or co-workers.

Success Factors

Provide ratings for each of the seven Success Factors below. One additional, optional fill in the blank section also exists. It can be used to capture another competency, job duty, or as a summary of overall goal completion to name just a few options.

Accountability

Owns decisions, outcomes, work products, etc. that are within the scope of one's role.

- Possesses full responsibility for achieving goals and objectives, effectively utilizing resources
- Takes initiative and completes work, tasks, objectives, etc., and meets commitments made to others ensuring they are on track to complete their work, tasks, etc.
- Actively communicates expectations, ways to accomplish them, and measures of success at both the individual and team levels

- Outstanding
- Exceeds Expectations
- Successful
- Improvement Expected
- Unacceptable

Comments:

Collaboration

Works inclusively to build trust and accomplish tasks, goals, and initiatives.

- Interacts with others by providing information, feedback, support, and ideas; encourages participation by asking questions and requesting feedback
- Demonstrates approachability and dependability and works toward mutually beneficial outcomes; assumes a facilitator and/or mentor role as needed
- Establishes and maintains working relationships with teams and peers; proactively seeks out and incorporates ideas and perspectives from others

- Outstanding
- Exceeds Expectations
- Successful
- Improvement Expected
- Unacceptable

Comments:

Communication

Provides information clearly and accurately in various settings, ensuring understanding and participation.

- Speaks and writes clearly and appropriately to both individuals and team(s), ensuring the message is understood and that needs are met
- Communicates using various approaches, formats, and styles, ensuring message is understood; coaches others on how to adjust tone and style when communicating
- Listens attentively to others and probes to confirm understanding of messages and/or request feedback

- Outstanding
- Exceeds Expectations
- Successful
- Improvement Expected
- Unacceptable

Comments:

Customer Focus

Understands, anticipates, and appropriately responds to internal and/or external customers' needs.

- Displays an active interest to fully understand concerns and issues; draws on own insights and relationships, in addition to experience, to best handle needs and inquiries
- Models positive service behavior and handles more complex cases; documents quality standards, process improvements, and protocols and uses the appropriate quality method when reviewing own and others' work
- Evaluates customer experience and ensures alignment with expectations and operating metrics; researches and shares best practices in customer service

Outstanding

Exceeds Expectations

Successful

Improvement Expected

Unacceptable

Comments:

Diversity & Inclusion

Values differences by ensuring that all people are included, respected and can engage in their work to the best of their abilities.

- Identifies, builds upon and integrates/incorporates specific capabilities needed to enhance diversity and inclusion in particular subject area and interactions
- Observes and is aware of employee interactions, ensuring that colleagues are treated fairly in department processes and practices and identifying/addressing when diversity and inclusion is not upheld
- Effectively integrates diverse perspectives into decisions, projects, and plans

Outstanding

Exceeds Expectations

Successful

Improvement Expected

Unacceptable

Comments:

Judgment

Makes appropriate decisions and evaluates risk and uncertainty to create optimal outcomes.

- Incorporates past experiences with available information and data to make more complex decisions; assists others in doing the same
- Maintains and follows standard procedures to make decisions and evaluate risks; ensures others are following standards, protocols, and procedures; identifies process improvements as needed
- Weighs both the short- and long-term effects and risks of decisions for self and team; involves others in the decision-making process as necessary

Outstanding

Exceeds Expectations

Successful

Improvement Expected

Unacceptable

Comments:

Time Management

Actively manages time to most effectively accomplish work, projects, objectives, and goals.

- Prioritizes work appropriately to meet deadlines and expectations; proactively identifies and responds to obstacles
- Achieves individual and team goals especially when obstacles/problems arise; accomplishes results in spite of challenges
- Balances multiple priorities, adapting quickly to shifting priorities; proactively helps others positively adjust to changes

Outstanding
Exceeds Expectations
Successful
Improvement Expected
Unacceptable

Comments:

Fill in the blank (optional)

Outstanding
Exceeds Expectations
Successful
Improvement Expected
Unacceptable

Comments:

Overall Rating

Rating:

Establish New Performance Goals

Establish new Performance Goals in the boxes below by providing a title, description, and weight for each goal.

Goal 1

Weight

%

Start:

Due:

Goal 2

%

Start:

Due:

Goal 3

%

Start:

Due:

Goal 4

%

Start:

Due:

Goal 5

%

Start:

Due:

Goal 6

%

Start:

Due:

Goal 7

%

Start:

Due:

Supervisor Final Comments

Employee Acknowledgment

I have discussed my performance appraisal with my supervisor. My signature does not necessarily indicate agreement with the appraisal, but does acknowledge that I have received and reviewed this information.

Employee Final Comments