



## Union-Eligible 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 next 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 break through 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 Success Factor below. Success Factors are "how" one goes about doing their job.

### Accountability

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

- Completes job-related tasks in a timely fashion; maintains and acceptable attendance record and is punctual
- Responds to directions; delivers expected results following specified timelines and/or procedures
- Works closely with supervisor to understand expectations for assignments; executes accordingly

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

**Comments:**

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### Collaboration

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

- Provides information and assistance to others as requested
- Works closely with supervisor and/or team lead to understand own role and how it contributes to the overall outcomes of the team
- Builds relationships and works collectively with immediate team to accomplish own work responsibilities

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

**Comments:**

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### Communication

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

- Documents work clearly, correctly, and completely using the appropriate method
- Exchanges information in a straightforward, clear manner; changes tone and message as necessary
- Demonstrates thoughtfulness and attention when listening to others, responding appropriately to questions

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

**Comments:**

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**Customer Focus**

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

- Actively listens to accurately identify and understand needs and requests; takes appropriate action following departmental protocol
- Consistently and reliably performs assigned tasks to meet needs; reviews own work for completeness, thoroughness, and accuracy before submitting
- Follows instructions from manuals, lead(s), and/or supervisor(s) when responding to needs/inquiries

Outstanding  
Exceeds Expectations  
Successful  
Improvement Expected  
Unacceptable

**Comments:**

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**Diversity & Inclusion**

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

- Builds awareness of diversity and inclusion through participation in diversity and inclusion initiatives
- Demonstrates a positive, respectful attitude towards others of different identity groups; notifies supervisor/manager if other's behavior or environment is hurtful or harmful to inclusion
- Provides service and learns how to make accommodations that meet the needs of people from different backgrounds, thoughts, etc.

Outstanding  
Exceeds Expectations  
Successful  
Improvement Expected  
Unacceptable

**Comments:**

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**Judgment**

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

- Collects and organizes necessary information for decision making
- Follows existing standards, protocols and procedures for monitoring own work; works efficiently; informs supervisor(s) and/or other appropriate parties when necessary
- Identifies short-term effects of decisions on own work products

Outstanding  
Exceeds Expectations  
Successful  
Improvement Expected  
Unacceptable

**Comments:**

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**Time Management**

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

- Manages own time with a focus on assignments; prioritizes task appropriately
- Completes tasks in a timely manner; meets deadlines
- Adopts new methods or ways of working based on guidance from supervisor

Outstanding  
Exceeds Expectations  
Successful  
Improvement Expected  
Unacceptable

**Comments:**

**Success Factors Rating**

**Rating:**

**Instructions to Complete Key Responsibilities**

Fill in three to seven Key Responsibilities in the spaces below. Key Responsibilities are the main tasks that are expected of the employee in the role. A discussion between the evaluator and employee should take place before any Key Responsibilities are identified.

**Key Responsibilities****Key Responsibility 1**

Outstanding  
Exceeds Expectations  
Successful  
Improvement Expected  
Unacceptable

**Comments:**

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**Key Responsibility 2**

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

**Comments:**

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**Key Responsibility 3**

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

**Comments:**

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**Key Responsibility 4**

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

**Comments:**

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**Key Responsibility 5**

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

**Comments:**

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**Key Responsibility 6**

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

**Comments:**

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**Key Responsibility 7**

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

**Comments:**

**Key Responsibilities Rating**

**Rating:**

**Overall Rating**

**Rating:**

## New Performance Goals

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

|               |               | <b>Weight</b> |
|---------------|---------------|---------------|
| <b>Goal 1</b> |               | %             |
|               | <b>Start:</b> | <b>Due:</b>   |
| <hr/>         |               |               |
| <b>Goal 2</b> |               | %             |
|               | <b>Start:</b> | <b>Due:</b>   |
| <hr/>         |               |               |
| <b>Goal 3</b> |               | %             |
|               | <b>Start:</b> | <b>Due:</b>   |
| <hr/>         |               |               |
| <b>Goal 4</b> |               | %             |
|               | <b>Start:</b> | <b>Due:</b>   |
| <hr/>         |               |               |
| <b>Goal 5</b> |               | %             |
|               | <b>Start:</b> | <b>Due:</b>   |
| <hr/>         |               |               |

**Goal 6**

%

**Start:**

**Due:**

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**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**