



## Leadership Probationary Appraisal

### Demographics

<b>Name:</b>	<b>Employee ID:</b>
<b>Job Title:</b>	<b>Supervisor:</b>
<b>Department:</b>	<b>Date:</b>

### General Instructions

The probationary Performance Appraisal is intended to a) summarize employee performance over the probationary period, and b) provide the employee and evaluator an opportunity to discuss performance and future development. Use the rating scale definitions below to help accurately document performance.

### 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

	Rating Scale
<p><b>Accountability</b> Owns decisions, outcomes, work products, etc. that are within the scope of one's role.</p> <ul style="list-style-type: none"> <li>• Creates opportunities for employees to grow, assume more responsibility, and/or gain decision-making authority</li> <li>• Motivates employees to achieve goals, including departmental/ functional goals and initiatives by giving them direct ownership and accountability for overall outcomes</li> <li>• Connects with other leaders to identify and define goals/objectives; exemplifies accountability for achieving goals/objectives and managing expectations</li> </ul>	
<p><b>Collaboration</b> Works inclusively to build trust and accomplish tasks, goals, and initiatives.</p> <ul style="list-style-type: none"> <li>• Ensures information flows effectively through proper channels; promotes and encourages the open exchange of information within and across functions/departments</li> <li>• Builds consensus with individuals within and across the functions/departments; provides clear direction during cross-functional tasks, ensuring open communication and collaboration</li> <li>• Motivates others to build relationships and work cooperatively within and across functions/departments</li> </ul>	
<p><b>Communication</b> Provides information clearly and accurately in various settings, ensuring understanding and participation.</p> <ul style="list-style-type: none"> <li>• Communicates highly complex or unusual circumstances appropriately, ensuring that content is shared and understood at all function/department levels</li> <li>• Uses a variety of communication tactics/ methods and adjusts messages and tone to more effectively communicate to various function/department levels</li> <li>• Models and encourages others to actively listen, allow for questions and discussion, and reflect on key messages, while ensuring stakeholders have a chance to provide input</li> </ul>	
<p><b>Customer Focus</b> Understands, anticipates, and appropriately responds to internal and/or external customers' needs.</p> <ul style="list-style-type: none"> <li>• Strategically identifies opportunities for service improvement; establishes an environment to maintain positive organizational and customer relationships</li> <li>• Gathers a variety of data and information and makes recommendations and improvements; leverages the integration and synergies among departments/functions to better serve others</li> <li>• Promotes a customer centric culture and ensures alignment with best practices and customer/university expectations</li> </ul>	
<p><b>Diversity &amp; Inclusion</b> Values differences by ensuring that all people are included and respected and can engage in their work to the best of their abilities.</p> <ul style="list-style-type: none"> <li>• Proactively provides resources and support for ongoing education of employees as it relates to diversity and inclusion; acknowledges and reinforces positive diversity and inclusion behaviors</li> <li>• Creates and leads a culture/environment of inclusion by exemplifying inclusive behaviors, challenging the status quo, and suggesting improvements, as appropriate; promotes the interaction and integration of diverse individuals into teams to positively impact the function/department and to ensure diversity and inclusion needs are met</li> <li>• Integrates different perspectives and backgrounds to meet organizational needs and establish the new way of working; models inclusive decision-making within own and across functions/departments</li> </ul>	

<p><b>Judgment</b> Makes appropriate decisions and evaluates risk and uncertainty to create optimal outcomes.</p> <ul style="list-style-type: none"><li>• Conducts in-depth analysis while considering multiple inputs to develop optimal alternatives and solutions</li><li>• Sets and implements standards for the function/department and integrates with other functions/departments</li><li>• Ensures others understand both short- and long-term effects and risks of decisions; monitors execution of decisions made; makes timely decisions when faced with ambiguous information</li></ul>	
<p><b>Time Management</b> Actively manages time to most effectively accomplish work, projects, objectives, and goals.</p> <ul style="list-style-type: none"><li>• Prioritizes workload of function/department; identifies barriers to ensure appropriate actions are being taken and deadlines are successfully met; seeks additional resources as necessary</li><li>• Manages and oversees multifaceted projects and assignments, ensuring that deadlines are efficiently met</li><li>• Anticipates changing circumstances and prepares function/department to maintain performance objectives; promotes a culture of positivity, continuous improvement, and adaptability/flexibility</li></ul>	

**Overall Rating**

**Rating:**

**Supervisor Final Comments**

**Employee Acknowledgment**

I have discussed my probationary 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**