



JACKSONVILLE UNIVERSITY

PERFORMANCE APPRAISAL

Employee Name:

Scheduled Review Date:

Department:

Job Title:

Reason for Review: Annual Merit Ninety Day Introductory Period

INSTRUCTIONS:

A. Key Performance Goals and Results for the Review Period

This performance evaluation is to serve as a record of performance and accomplishments during the period being evaluated. Its purpose is to summarize the information necessary to report the individual's current performance and to assist both parties in an annual goal-setting process. Please review Ratings below and the Descriptions of Performance Review Goals Form.

RATING INFORMATION:

- **Consistently Exceeds All Goals and Expectations (CE)**
Employee is consistently an exceptional performer and far exceeds all goals and expectations. All job requirements, planned goals and objectives were achieved well above expectations. Accomplishments were also made in unexpected areas. A rare rating given to those whose performance is obvious to all who are familiar with the position requirements.
- **Often Exceeds Goals and Expectations (OE)**
Employee often exceeds goals and expectations. Performance is clearly above established expectations. This individual is consistently seeking improvement of self, office practices, team and service standards to students and other constituents. Often this individual is the "go to" person who not only exceeds expectations, but is seen by others as a pivotal performer.
- **Successfully Achieves Goals and Expectations (SA)**
Employee is a solid performer. This individual fully meets the goals and expectations of the position and may on occasion exceed expectations. The employee performs well and requires little guidance with performing the job. All requirements of performance were met and goals and objectives were achieved.
- **Developing Performer (DP)**
Employee is a new staff member (less than one year) or recently promoted to a new position with new responsibilities. This rating reflects that the individual is in a growth and learning mode in terms of mastering all aspects of the position. Greater growth and development in the role can and are in the process of being achieved.
- **Improvement Needed (IN)**
Employee meets some of the job expectations, but performance does not meet all the requirements and is below the level expected of a proficient employee. A rating at this level anticipates improvement is achievable and requires a performance plan be written. An individual in this level generally requires greater than usual time and attention by the supervisor. Employees at this level are expected to improve at an acceptable level of performance within a specified period of time.
- **Does Not Meet Expectations (DM)**

Employee does not meet the goals and expectations required of the position. Performance at this level is clearly unacceptable and cannot continue. A specific performance improvement plan must be written and the employee is expected to meet goals and expectations within a relatively short period of time.

In this Performance Goal section, the supervisor should select 3-5 goals and objectives. Please indicate the performance results, rating and weight percentage that aligns with the employee's role, which supports the department's goals. In writing performance results, be specific using facts, figures, and specific examples of performance results and behaviors. Use additional pages if necessary.

Performance Goals	Performance Results	Rating	Weight % (Optional)
1.			
2.			
3.			
4.			
5.			
6.			
7.			

B. Overall Performance Rating

How well is the individual performing in the present job?

Consider the ratings and importance of key job responsibilities and the performance factors. Also consider changes to the key job responsibilities and performance factors as well as additional contributions made by the individual over and above the key job responsibilities. Then check the definition that best describes the employee's **overall** performance level.

<input type="checkbox"/> Does Not Meet	<input type="checkbox"/> Improvement Needed	<input type="checkbox"/> Developing Performer	<input type="checkbox"/> Successfully Achieves	<input type="checkbox"/> Often Exceeds	<input type="checkbox"/> Consistently Exceeds
--	---	---	--	--	---

Manager/Supervisor Summary: Please summarize the specific job related reasons that support your rating. Identify strengths and areas that need attention for next year. Highlight any additional contributions.

C. Goals, Objectives and Development Planning

To be completed by the employee and supervisor: Identify 3-5 major goals, strategies and ideas for the coming year. List specific actions both of you have agreed will achieve the performance goals of your office/department in the coming year. The following **“SMART”** criteria can be used as guideline to establishing goals: **S**pecific, **M**easurable, **A**ction-Oriented, **R**ealistic and **T**ime-Bound. What are the developmental activities that will provide broadening experiences for the individual?

Performance Goals	Performance Activities	Manager Support (completed by manager)	Success Measures	Target Completion Date
Example: Improve clarity and professionalism of email communication across campus.	Enroll in a training class on effective email communication.	Review and confirm employee's email communication is professional with other select individuals in order to validate delivery is clear and professional.	-Successful completion of training class. -Manager received no complaints about clarity or tone of communications.	June 30, 2015
Goal #1				
Goal #2				

D. Employee's Comments

Feel free to comment here on any aspects of this discussion. Attach additional paper as needed.

E. Acknowledgement: I have read this form and discussed it with my supervisor.

Employee's Signature: _____ Date: _____

Supervisor's Approved Signature: _____ Date: _____

DESCRIPTION OF PERFORMANCE GOALS

PLANNING, ORGANIZING, AND GOAL SETTING:

Definition: Actively engages in planning and assessment processes based on reaching established targets, goals and objectives.

Observable Behaviors:

- Schedules time to work efficiently by prioritizing objectives and associated tasks
- Develops systematic approach in carrying out assignments and coordinating multiple activities
- Monitors activities to determine whether they conform to planned action, requesting regular feedback on results
- Develops innovative strategies/strategic alternatives to arrive at solutions
- Sets performance standards then utilizes assessment results to identify follow up action

QUANTITATIVE OBJECTIVES AND GOALS:

Definition: The ability to meet measurable objectives relative to the success of the position and measurements required for the University's success.

Observable Behaviors:

- Develops standard business process metrics for area of responsibility
- Expenditures in area of responsibility do not exceed allotted budgeted amounts
- Meets pre-established numeric goals set from prior appraisal period (quotas, etc.)
- Ability to meet accuracy percentage goals (rate of results)

KNOW HOW/PROBLEM SOLVING SKILLS:

Definition: The ability to assess and define any situation, establish solutions and decide on the effective action to be taken while demonstrating the understanding and knowledge of policy, procedures, resources, consequences and impact on the individuals within the organizational culture.

Observable Behaviors:

- Understands and applies appropriate technical/operational procedures, practices and principles
- Sharpens and updates skills; keeps informed about current developments in his/her area of expertise
- Diagnoses problem situations or conditions; obtains / verifies needed information; identifies alternatives; develops and recommends realistic solutions; implements solutions within a reasonable time
- Projects objectivity; Tackles problems with a logical and systematic approach; willing to make difficult and unpopular decisions as appropriate
- Takes responsibility when necessary to facilitate change, overcome an impasse, face issues, or ensure that decisions are made
- Acceptance of accountability for one's actions. The conscientious fulfillment of one's obligations; has demonstrated reliability and trustworthiness

FLEXIBILITY / INNOVATION:

Definition: Openness to different and new ways of doing things; willingness to consider alternative ways of doing things based on the satisfaction of students, constituents and community relations.

Observable Behaviors:

- Works cooperatively with colleagues, supervisors and subordinates, using the ability to see the merits of other perspectives in order to produce innovative solutions
- Modify strongly held position or strategy in the face of contrary evidence or lack of success
- Develops better, faster, more efficient and effective, or less expensive ways to do things
- Supports the development of new services, procedures or approaches
- Ability to respond and overcome unplanned obstacles with composure and to act rationally in stressful situations

WORKING RELATIONSHIPS:

Definition: Effective relationship building skills; Ability to collaborate with employees at all levels. Seeks to recognize, understand, and respond effectively to similarities and differences in people and makes better decisions based on that understanding.

Observable Behaviors:

- Builds rapport by demonstrating respect for the opinions, abilities and contributions of others
- Ability to be tactful, diplomatic, cooperative and open-minded, a willing and successful team member
- Understands human behavior; promotes interpersonal trust and respect
- Understands the conflicts between individual needs and the requirements of the organization
- Follows through on commitments in a timely manner
- Effectively demonstrates respect for colleagues and willingly works with a diverse community of co-workers, students and constituents

COMMUNICATION SKILLS:

Definition: Effectively communicates at all levels (verbal, written, and listening).

Observable Behaviors:

- Practices attentive and active listening
- Effectively communicates goals/objectives and interplay of ideas and concepts using active feedback
- Displays a willingness to discuss weaknesses and suggest/make improvements, expressing disagreements constructively
- Communicates appropriate information; maintains confidentiality
- Ability to express oneself, whether verbal or written, in a clear and concise manner

COMMITMENT TO ENHANCE UNIVERSITY LEARNING AND LIVING ENVIRONMENT:

Definition: Actively creates and supports programs and policies to increase satisfaction of constituents, who are defined as students, parents, colleagues and or the community at large (Alumni).

Observable Behaviors:

- Consistently demonstrates a professional, friendly, and courteous demeanor
- Ability to provide information concerning the University's products and services
- Demonstrates the ability to effectively resolve constituent related issues and concerns
- Takes the extra step to make the constituent feel welcome, and that their problems were heard and resolved
- Contributes thoughts and ideas for potential services to increase constituents satisfaction

PUNCTUALITY & ATTENDANCE:

Definition: Faithfulness in reporting to work and conforming to the University's work hours.

Observable Behaviors:

- Minimum use of sick leave (not excessive within the last 12 month period)
- Conforms to the University's work hours/schedules
- Demonstrates good work attendance (unscheduled time off is kept to a minimum)
- Provides advance notice for time off (vacation, personal, sick – doctor's appointments)

EFFECTIVE LEADERSHIP AND SUPERVISORY SKILLS: (Supervisory Employees Only)

Definition: An effective leader/supervisor recognizes the difference between managing, leading and performing tasks. Lead, guide and inspire employees to work at the appropriate level of responsibility with an effective level of knowledge and training.

Observable Behaviors:

- Delegates routine tasks to employees, recognizing the importance of developing employees and improving job satisfaction; evaluates on the basis of performance not personality
- Implements change with a positive impact by inspiring the cooperation of others
- Anticipates, addresses and resolves employee relations issues; consistently provides ongoing feedback and conducts performance reviews on time; projects objectivity and fair-mindedness
- Enforces policies, procedures, rules, laws and regulations (i.e. NCAA compliance); monitors the release of confidential information; exercises appropriate budget and cost controls
- Determines required activities and staffing needs; arrange appropriate level of training of all employees; monitors employee absenteeism