



Employee Performance Appraisal FY15

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 a) summarize employee performance over the past year, and b) provide the employee and evaluator an opportunity to discuss performance and future development. Two sections of the form count toward the employee's overall rating: Success Factors and Key Responsibilities. The rating scale definitions, provided below, can help the evaluator accurately document an employee's performance. The comment boxes should be used to indicate specific examples that support the rating. If a rating of "Outstanding" or "Unacceptable" is given, a comment must be provided.

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 Key Responsibility or Success Factor. 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 Key Responsibility or Success Factor. 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 Key Responsibility or Success Factor. 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 Key Responsibility or Success Factor. 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

Accountability

Maintains an acceptable attendance record and is punctual. Takes ownership of tasks and assignments. Follows through on commitments. Reliably produces results with little need for oversight. If applicable, effectively manages employees, including completing performance appraisals for employees in a thorough and timely manner.

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

Comments:

Collaboration

Demonstrates willingness to work harmoniously and effectively with colleagues at various levels to solve problems, improve work processes, or accomplish specific tasks. Earns respect, builds trust and collaborates effectively with coworkers. Demonstrates willingness to assist, encourage and support others. Contributes to goals, objectives and morale of work group. Values and contributes to a professional and inclusive environment.

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

Comments:

Communication

Expresses ideas clearly and accurately, both verbally and in writing. Listens actively and patiently. Balances both listening and talking. Conveys information effectively in an informative manner. Encourages an open exchange of ideas and opinions. Maintains channels of communication throughout the organization. Is receptive to feedback.

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

Comments:

Customer Focus

Makes a concerted effort to serve the needs of internal and external customers.
Anticipates the needs of internal and external customers and acts accordingly.
Fosters cooperative relations. Exercises tact and diplomacy in dealing with others.
Is courteous, considerate, patient and respectful.

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

Comments:

Judgment

Follows established safety procedures; pays attention to personal safety and the safety of others. Complies with University rules and policies. Relies on experience and institutional knowledge. Obtains, evaluates, organizes and synthesizes pertinent information to reach logical conclusions. Makes timely, sound decisions even under conditions of risk and uncertainty.

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

Comments:

Quality

Demonstrates competence, accuracy, thoroughness, reliability and timeliness.
Maintains high quality work relative to established standards. Pursues better ways to get things done. Positively supports change. Is willing to learn. Handles confidential information appropriately.

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

Comments:

Time Management

Efficiently accomplishes all tasks. Manages time wisely. Is able to set priorities and handle multiple priorities at once. Work is completed on time. Level of output meets requirements. Demonstrates flexibility and adapts to changing work demands, priorities and circumstances.

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

Comments:

Success Factors Rating

Rating:

Instructions to Complete Key Responsibilities

Please rate the Key Responsibilities using the rating scale that is described at the top of the form. Three to seven Key Responsibilities for this position need to be identified. 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:

Key Responsibility 2

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

Comments:

Key Responsibility 3

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

Comments:

Key Responsibility 4

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

Comments:

Key Responsibility 5

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

Comments:

Key Responsibility 6

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

Comments:

Key Responsibility 7

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

Comments:

Key Responsibilities Rating

Rating:

Overall Rating

Rating:

Compliance Training Completion

[Compliance Training](#)

Did the employee complete all of his or her compliance training required for Fiscal Year 2015? This section does not affect the overall appraisal rating.

Yes

No

Comments:

Instructions for Assessment of Previous Performance Goals

This section is to record accomplishments of previous Performance Goals; detail up to five of your previous Performance Goals in the boxes below. Select the appropriate rating and update accomplishments as applicable. This section does not affect your overall appraisal rating.

Performance Goal Results

Goal 1

Rating:

Due:

Action Steps

Accomplishments/Progress on Action Steps

Goal 2

Rating:

Due:

Action Steps

Accomplishments/Progress on Action Steps

Goal 3

Rating:

Due:

Action Steps

Accomplishments/Progress on Action Steps

Goal 4

Rating:

Due:

Action Steps

Accomplishments/Progress on Action Steps

Goal 5

Rating:

Due:

Action Steps

Accomplishments/Progress on Action Steps

Review of Previous Year Development Plans

Review each of your previously established development plans. Detail accomplishments and provide a status. This section does not affect your overall appraisal rating.

Previous Development Plans

Development Plan 1

Accomplishments

Status:

Development Plan 2

Accomplishments

Status:

Development Plan 3

Accomplishments

Status:

Development Plan 4

Accomplishments

Status:

Development Plan 5

Accomplishments

Status:

Establish New Performance Goals

It is recommended to establish 1 - 5 **SMART** goals for the upcoming performance period:

S - specific, significant, stretching

M - measurable, meaningful, motivational

A - agreed upon, attainable, achievable, acceptable, action-oriented

R - realistic, relevant, reasonable, rewarding, results-oriented

T - time-based, timely, tangible, trackable

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

Establish New Development Plans

Include up to five Development Plans, describing the title and details in the boxes below. Should this Development Plan align directly with an existing Success Factor or Key Responsibility, select it from the drop down, otherwise maintain the default selection of none.

Examples of possible activities for Development Plans may include using myLearn resources, attending training sessions or professional development conferences, joining a professional organization, working towards licensures or certifications, etc. This section does not affect your overall appraisal rating.

Development
Plan 1

Due:

Competency:

Development
Plan 2

Due:

Competency:

Development
Plan 3

Due:

Competency:

Development
Plan 4

Due:

Competency:

Development
Plan 5

Due:

Competency:

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