



PERFORMANCE REVIEW AND DEVELOPMENT PROCESS

SETTING EXPECTATIONS AND FINAL APPRAISAL
ADMINISTRATIVE / MANAGERIAL FORM



Employee Name: _____ Supervisor: _____
 ID Number: _____ Period Covering: _____
 Job Title: _____ Date of Review: _____
 Division/Dept: _____ Section/Unit: _____

Expectation Setting Meeting Held and Job Priorities Discussed: _____ (Date)

 Supervisor's Signature Employee's Signature

Midway Feedback Session Held: _____ (Date)

 Supervisor's Signature Employee's Signature

Final Appraisal Meeting Held: _____ (Date)

Please check one: The employee and supervisor are [_____ in agreement _____ not in agreement] with the performance appraisal results. If not agreed, area(s) of disagreement are indicated below:

 Supervisor's Signature Employee's Signature

Reviewed by next higher level supervisor (or departmental designee):

 Reviewer's Name (Please Print) Reviewer's Signature

Note: The employee's signature does not necessarily indicate agreement with the performance appraisal results. The signature indicates only that the performance appraisal review was held.

OVERALL RATING SCALE:	
Outstanding	<u>Exemplary performance</u> in all areas of the job.
Exceeds Expectations	<u>Surpasses the standards</u> and established performance expectations in many important areas of the job.
Meets Expectations	<u>Good performance.</u> Consistently meets standards and established performance expectations in important areas of the job.
Below Expectations	Performance <u>does not meet expectations</u> in some important areas of the job; below expected levels. Improvement needed.
Unsatisfactory	Performance falls <u>below expectations in many areas</u> of the job. Substantial improvement critical.

These are the general rating categories. Specific expectations must be set by the supervisor and employee for each performance factor.

Outstanding	<u>Exemplary performance</u> in all areas of the factor.
Exceeds Expectations	<u>Surpasses the standards</u> and established performance expectations in many important areas of the factor.
Meets Expectations	<u>Good performance</u> . Consistently meets standards and established performance expectations in important areas of the factor.
Below Expectations	Performance <u>does not meet expectations</u> in some important areas of the factor; below expected levels. Improvement needed.
Unsatisfactory	Performance falls <u>below expectations in many areas</u> of the factor. Substantial improvement critical.

1. SETTING OBJECTIVES

Establishing appropriate objectives and priorities for the unit based on strategic goals of the University; communicating objectives and priorities to others; updating objectives as needed.

Definition of "Meets Expectations"

Outstanding	Exceeds Expectations	Meets Expectations	Below Expectations	Unsatisfactory

Comments on Performance

2. ORGANIZATION AND WORK ALLOCATION

Organizing the workflow and relationships among people and functions in the unit; delegating work to make efficient use of resources and to develop people's capabilities; facilitating the flow of information among individuals and groups.

Definition of "Meets Expectations"

Outstanding	Exceeds Expectations	Meets Expectations	Below Expectations	Unsatisfactory

Comments on Performance

3. STAFFING

Planning and staffing the unit with the appropriate number and skills mix of employees; selecting a highly qualified and diverse workforce for the unit consistent with the University's policies on equal employment and affirmative action; using staff creatively to solve staffing shortages.

Definition of "Meets Expectations"

Outstanding	Exceeds Expectations	Meets Expectations	Below Expectations	Unsatisfactory

Comments on Performance

Outstanding	<u>Exemplary performance</u> in all areas of the factor.
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Meets Expectations	<u>Good performance.</u> Consistently meets standards and established performance expectations in important areas of the factor.
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4. LEADERSHIP AND MOTIVATION

Creating and maintaining a productive environment where people strive for quality of service supportive of all staff; fostering a commitment for achieving unit and University goals; setting a positive example for others to follow.
Definition of "Meets Expectations"

Outstanding	Exceeds Expectations	Meets Expectations	Below Expectations	Unsatisfactory

Comments on Performance

5. PERFORMANCE REVIEW AND DEVELOPMENT PROCESS

Reaching agreement with employees on their objectives and measures; providing employees with frequent performance feedback and coaching; counseling employees to correct performance problems; evaluating performance and conducting performance review discussions; supporting employees in increasing their capabilities; identifying training needs and suggesting training programs.
Definition of "Meets Expectations"

Outstanding	Exceeds Expectations	Meets Expectations	Below Expectations	Unsatisfactory

Comments on Performance

6. CUSTOMER SERVICE

Understanding the needs of internal and external customers; making special effort to be responsive in meeting their needs and in building customer satisfaction.
Definition of "Meets Expectations"

Outstanding	Exceeds Expectations	Meets Expectations	Below Expectations	Unsatisfactory

Comments on Performance

Outstanding	<u>Exemplary performance</u> in all areas of the factor.
Exceeds Expectations	<u>Surpasses the standards</u> and established performance expectations in many important areas of the factor.
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7. COMMUNICATION SKILLS

Speaking clearly, concisely, and using words easily understood; exchanging ideas with others; listening to understand meaning or oral material; writing reports, memos, letters, etc.; using appropriate style, format, spelling, and grammar; writing in a clear, concise and appropriate manner.

Definition of "Meets Expectations"

Outstanding	Exceeds Expectations	Meets Expectations	Below Expectations	Unsatisfactory

Comments on Performance

8. COOPERATION AND TEAMWORK

Putting the group's success ahead of personal goals; sharing information and resources with others; giving timely response to requests made by others; promoting teamwork; exhibiting positive attitudes during times of change; taking on new tasks with enthusiasm and energy.

Definition of "Meets Expectations"

Outstanding	Exceeds Expectations	Meets Expectations	Below Expectations	Unsatisfactory

Comments on Performance

9. QUALITY OF WORK

Completing work thoroughly, accurately, neatly, and according to specifications; producing output with minimal errors.

Definition of "Meets Expectations"

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Comments on Performance

Outstanding	<u>Exemplary performance</u> in all areas of the factor.
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10. QUANTITY OF WORK

Consistently producing a high volume of acceptable work; producing services or output quickly and efficiently.

Definition of "Meets Expectations"

Outstanding	Exceeds Expectations	Meets Expectations	Below Expectations	Unsatisfactory

Comments on Performance

11. JOB KNOWLEDGE

Understanding job procedures, policies, and responsibilities; keeping up-to-date technically; acting as a resource person on whom others rely for assistance.

Definition of "Meets Expectations"

Outstanding	Exceeds Expectations	Meets Expectations	Below Expectations	Unsatisfactory

Comments on Performance

12. Supplementary Performance Factor/Project: _____

Definition: _____

Definition of "Meets Expectations"

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Comments on Performance

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13. Supplementary Performance Factor/Project: _____

Definition: _____

Definition of "Meets Expectations"

Outstanding	Exceeds Expectations	Meets Expectations	Below Expectations	Unsatisfactory

Comments on Performance

14. Supplementary Performance Factor/Project: _____

Definition: _____

Definition of "Meets Expectations"

Outstanding	Exceeds Expectations	Meets Expectations	Below Expectations	Unsatisfactory

Comments on Performance

OVERALL RATING: The supervisor must assign an overall rating to the employee's cumulative performance throughout the review cycle. The determination of the overall rating shall be consistent with the rating scale below.

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DEVELOPMENT PLANS

To be completed by employee and supervisor together using information from previous sections

MAJOR STRENGTHS:

In which performance factors/projects did the employee excel?

AREAS FOR IMPROVEMENT / ENHANCEMENT:

Which performance factors/projects are in need of improvement or enhancement?

ACTION PLANS:

What actions should be taken by the employee and/or supervisor to improve the employee's performance and help achieve goal(s) during the next performance period?

	<u>Action Plan</u>	<u>Time Frame</u>
<u>Employee:</u>		
<u>Supervisor:</u>		

TRAINING PLANS:

List the training actions that will be taken to improve performance weaknesses in the current job or to develop additional employee skills.

