



Leader Performance Appraisal FY15

Demographics

Name:

Employee ID:

Job Title:

Supervisor:

Department:

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: Performance Goals/Key Responsibilities and Success Factors. 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 Performance Goal 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 Performance Goal 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 Performance Goal 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 Performance Goal 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.

Instructions for Assessment of Previous Performance Goals or Key Responsibilities

This section is to record accomplishments of previous Performance Goals or Key Responsibilities; detail your previous Performance Goals or Key Responsibilities in the boxes below. Select the appropriate rating and update accomplishments as applicable. For additional goals or Key Responsibilities, click on the Add Goal link.

Performance Goal Results or Key Responsibilities

Weight

**Goal or Key
Responsibility 1**

%

Rating:

Due:

Action Steps

Accomplishments/Progress on Action Steps

**Goal or Key
Responsibility 2**

%

Rating:

Due:

Action Steps

Accomplishments/Progress on Action Steps

**Goal or Key
Responsibility 3**

%

Rating:

Due:

Action Steps

Accomplishments/Progress on Action Steps

**Goal or Key
Responsibility 4**

%

Rating:

Due:

Action Steps

Accomplishments/Progress on Action Steps

**Goal or Key
Responsibility 5**

%

Rating:

Due:

Action Steps

Accomplishments/Progress on Action Steps

**Goal or Key
Responsibility 6**

%

Rating:

Due:

Action Steps

Accomplishments/Progress on Action Steps

Rating:

Due:

Action Steps

Accomplishments/Progress on Action Steps

Performance Goals or Key Responsibilities Rating

Rating:

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. 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:

Culturally Competent

Demonstrates intercultural awareness and understanding. Communicates effectively across cultures. Integrates multiple perspectives and values. Leverages differences.

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

Comments:

Performance Driven

Drives excellence and sets high standards. Communicates explicit expectations. Demands accountability. Promotes innovation. Demonstrates results orientation.

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

Comments:

People Centered

Models high emotional intelligence, self - awareness, and self-confidence. Invests in and develops others, unleashes talent in others. Practices "shared leadership." Effectively integrates work and personal life.

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

Comments:

Values Oriented

Demonstrates integrity and authenticity. Models and demands ethical behavior. Inspires trust. Demonstrates wisdom and seeks common good. Builds and maintains relationships.

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

Comments:

An Integrative & Strategic Leader

Develops and communicates comprehensive vision, strategy and clear purpose. Builds collaborative relationships with multiple stakeholders. Actively seeks external inputs. Proactively manages change.

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

Comments:

Success Factors Rating

Rating: Not Rated

Overall Rating

Rating: Not Rated

Culture of Health Support

Indicate the degree to which the employee supports the President's Culture of Health Initiative by using the rating scale below.

Ratings in this section will not affect the overall score this year.

Culture of Health Competency

Supports employees in being active during the workday. Encourages employees to eat well, including promoting healthy food options at office events. Promotes work-life fit, such as discussing flexible work arrangements that support all aspects of employees' lives. Encourages employees to work healthy, including encouraging education about ergonomic solutions. Empowers employees to engage in learning opportunities and show appreciation for their work.

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

Comments:

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:

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:

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:

Goal 2

%

Start:

Due:

Goal 3

%

Start:

Due:

Goal 4

%

Start:

Due:

Goal 5

%

Start:

Due:

Establish New Development Plans

Include a Development Plan title and details in the boxes below. Should this Development Plan align directly with an existing Success Factor, 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