

# Performance Appraisal Form

Fiscal/Academic Year: \_\_\_\_\_

Employee Name: \_\_\_\_\_ Department: \_\_\_\_\_

**PART I: Review of Key Duties and Responsibilities:**

The reviewer and employee have discussed the key job duties and responsibilities. The job description used for this appraisal is (check one):

\_\_\_\_\_ Same as prior period, OR

\_\_\_\_\_ Revised (changes to be coordinated with Human Resources)

**PART II: Competencies Expected for Successful Performance**

The following ratings are to be used for each competency area:

**Unacceptable:** Performance did not improve in spite of prior notice

**Needs Improvement:** Sometimes acceptable but not consistent

**Meets:** Consistently meets requirements of the job

**Exceeds:** Clearly and consistently above what is required

<b>Communication and Interpersonal Skills</b>					
<i>Competency Area</i>	<i>Competency Description</i>	<b>Unacceptable</b>	<b>Needs Improvement</b>	<b>Meets</b>	<b>Exceeds</b>
<b><i>Positive Work Relationships</i></b>	Exhibits positive behavior when interacting with coworkers, administrators, students, visitors, and other members of the University community.				
<b><i>Collaboration and Teamwork</i></b>	Mission-oriented and displays willingness to work cooperatively and collaboratively with others in a variety of work settings.				
<b><i>Respect</i></b>	Respects individual differences and strengths in other employees. Demonstrates sensitivity to cultural and ethnic differences in all interactions. Treats others fairly and is responsive to the needs of others.				
<b><i>Communication</i></b>	Communicates and engages effectively, compassionately, and clearly with others. Actively listens to others to understand and respond to their needs. Engages others in two-way conversations to clarify expected outcomes.				
<b><i>Professionalism</i></b>	Exhibits professional behaviors in the workplace. Models ethical behavior and personal accountability to others. Manages stress effectively and maintains self-control/professionalism under adverse conditions.				
<b><i>Interpersonal Skills</i></b>	Uses tact and diplomacy in handling sensitive situations, and respects confidentiality. Addresses opportunities and concerns with the appropriate individual in a professional manner. Offers and accepts constructive feedback from others and uses it to strengthen performance.				
<b><i>Decision Making and Discernment</i></b>	Makes responsible and appropriate decisions, prioritizes needs, and takes action that is consistent with, enforces, and reflects the University's Jesuit mission and identity. Seeks opportunities to provide input to decision making processes. Positively supports decisions once they are made.				

<b>Job Responsibility and Stewardship</b>					
<b>Competency Area</b>	<b>Competency Description</b>	<b>Unacceptable</b>	<b>Needs Improvement</b>	<b>Meets</b>	<b>Exceeds</b>
<b>Job Knowledge</b>	Demonstrates knowledge of relevant theories, policies, procedures and technologies required to perform job.				
<b>Quality of Work</b>	Produces high quality work with focus on accuracy; attention to detail; completeness.				
<b>Time Management</b>	Uses time wisely; demonstrates expected attendance; is punctual for meetings; is dependable and reliable.				
<b>Quantity of Work</b>	Completes work within established time frames; performs a high volume of work with expected quality.				
<b>Accountability</b>	Accepts responsibility and ownership for decisions, work outputs and performance outcomes; adheres to University policies, procedures, practices and regulations.				
<b>Knowledge of University Resources</b>	Has a thorough understanding of University resources and how to use them to maximize job effectiveness. Shares this information with others.				
<b>Adaptability</b>	Demonstrates ability to multitask and work effectively in a changing environment.				
<b>Efficiency</b>	Seeks ways to improve the utilization of University resources. Is cost-effective and budget conscious.				
<b>Initiative/ Innovation</b>	Motivated to succeed; takes on new projects and assignments and delivers results in creative new ways; identifies ways to improve departmental results; problem solver.				
<b>Professional Development</b>	Continuous desire and movement toward increasing personal and professional development; strives to achieve additional certifications (if possible); looks for ways to enhance effectiveness.				
<b>Supervisory and Managerial Competencies (only to be completed for employees who manage people)</b>					
<b>Appraising Performance</b>	The ability to fairly, objectively, and routinely set goals, review performance and provide honest and constructive feedback.				
<b>Conflict Management</b>	The ability to quickly deal with conflict, and select the best approach to address and reduce the conflict.				
<b>Coaching</b>	The ability to provide instruction in a non-threatening manner; be a good role model, encourage development.				
<b>Team Development</b>	The ability to build a group into a cohesive, focused, synergistic group aimed toward the accomplishment of set goals and objectives.				
<b>Project Management</b>	The ability to keep projects moving on schedule, stress the importance of deadlines and quality, and the efficient use of time.				
<b>Delegation</b>	The ability to give authority to another when appropriate, to solve problems, set goals, and establish the time frames.				
<b>Plan/Organize</b>	The ability to project upcoming needs, schedule appropriately, manage budget and other resources, and ensure that adequate tools, training, and support are available,				
<b>Leadership</b>	The ability to model for others organizational commitment, enthusiasm, support of the mission, respect for diversity, quality work standards, persistence, and adaptation to needed change.				

**PART III: Projects or Goals that will be accomplished during the Rating Period:**

The reviewer and employee will discuss and document one (1) to three (3) projects or goals that will be achieved during the rating period that relate to the expected performance of the individual and to the unit's goals. In addition, the reviewer and employee will discuss and document one (1) stretch goal that will present a challenge designed to enhance the employee's skills and knowledge, and make a significant contribution to the department's current or future needs.

The prompts to be used in establishing these goals are as follows:

What is the project or goal that will be achieved?	How will we measure that it has been accomplished?	What resources, including training, does employee need?	What timeframe is expected for project or goal achievement?
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**Goal (1):**

Click here to enter text.

**Goal (2):**

Click here to enter text.

**Goal (3):**

Click here to enter text.

**Summary**

NOTE: A manager at least one level above the reviewer will discuss the final rating with the reviewer before it is discussed with the employee.

Overall Rating (Annual Review): \_\_\_\_\_

Reviewer's Comments:

Signature of Reviewer: \_\_\_\_\_

Date: \_\_\_\_\_

Signature of Manager: \_\_\_\_\_  
(If not the primary reviewer)

Date: \_\_\_\_\_

Signature of Divisional Vice President: \_\_\_\_\_

Date: \_\_\_\_\_

Employee Comments:

Employee Signature: \_\_\_\_\_

Date: \_\_\_\_\_