



### **Model B (Unclassified) Performance Evaluation**

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

Date of Current  
Performance Evaluation: \_\_\_\_\_ Performed by: \_\_\_\_\_

#### **Purpose of a Performance Evaluation**

- Align employee performance with the mission and goals of the university and unit.
- Strengthen two-way communication regarding job performance and periodically assess goals and opportunities for the unit and the individual.
- Establish a mutually-understood set of performance expectations.
- Recognize contributions of employees.
- Discuss opportunities for growth and development.
- Provide necessary feedback when performance does not meet expectations.

#### **Process**

- Employee completes the self-evaluation at least one week prior to the performance evaluation discussion.
- Supervisor/manager review's the full range of performance over the entire past year and completes all sections of the performance evaluation, following the instructions provided in each section.
- The supervisor/manager meets with the employee to discuss the full range of employee performance, consistent with informal, ongoing performance feedback. Create shared goals and objectives to enhance employee performance and professional development.
- Upon completion of the performance evaluation discussion, the employee and supervisor/manager sign the evaluation.
- The supervisor/manager sends the signed copy to Employee Relations, Terrace Hall Annex.
- A photocopy can be provided to the employee upon request.
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#### **Instructions:**

- Read the criteria for each competency and mark those that apply to the employee's performance.
- In the Rating/Assessment of Competencies section, enter your rating and include specific examples and illustrations.
- Select N/A if the competency is not applicable.
- Comments are required when selecting a rating of "approaches expectations" or "unsatisfactory".

### Rating Scale:

<b>Outstanding (5)</b>	Objectives and standards are clearly and substantially surpassed. Consistently and significantly exceeds all performance expectations and standards. Highest performance level. Demonstrates a personal commitment to a high level of performance and results, even under challenging work goals.
<b>Exceeds Expectations (4)</b>	Frequently exceeds job requirements. Makes contributions well beyond job demands. Seizes initiative in development and implementation of challenging work goals. Each project or job is done thoroughly and on time. Thinks beyond details of the job, working toward the overall goals of the component.
<b>Meets Expectations (3)</b>	Performance is what is expected of a fully qualified and experienced person in this position. All objectives and standards are met. Consistently meets all performance expectations and standards. Job well done. Errors are minimal and seldom repeated. Prioritizes problems and projects well. Requires normal supervision and follow-up. Almost always completes work or projects on schedule.
<b>Approaches Expectations (2)</b>	Objectives and standards are generally met but full results are not totally achieved. Occasionally falls short of consistently meeting performance expectations and standards. Some performance aspects were not met – needs slight improvement. Could result from being newly appointed to the position – continuing to learn all aspects of the position.
<b>Unsatisfactory (1)</b>	Objectives and standards are consistently not met. Consistently fails to meet performance expectations. Needs significant improvement. Has been on the job long enough to have shown better performance. Excessive attention by supervisor is required. Does not grasp situation when explained. Corrective action is required.
<b>NA= Not Applicable</b>	Does not apply to job performance expectations.

### CORE COMPETENCIES

#### I. Job Knowledge:

- I-A. Demonstrates knowledge and skills necessary to perform the job effectively  
☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A
- I-B. Applies knowledge and skills to critical work issues in a timely manner  
☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A
- I-C. Demonstrates willingness to learn new skills, methods, processes to enhance job performance  
☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A
- I-D. Understands the University's strategic goals, policies, and procedures as related to job responsibilities  
☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A
- I-E. Uses technology appropriately and efficiently  
☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A

I-F. Performs the full range of responsibilities and duties associated with the job  
☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A

## II. Communication Skills:

II-A. Writes and speaks clearly and accurately  
☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A

II-B. Encourages collaboration and sharing of information  
☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A

II-C. Listens well; is responsive to inquiries, directions, and suggestions  
☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A

II-D. Seeks to understand others' communications  
☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A

## III. Interpersonal Skills, Cooperation, Collaboration:

III-A. Demonstrates effective positive customer/student services.  
☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A

III-B. Develops and maintains professional working relationships with internal and/or external constituencies  
☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A

III-C. Makes suggestions to improve the efficiency and effectiveness of the work unit with due concern for others  
☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A

III-D. Willingness to assume fair share of responsibility without preempting input of others  
☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A

III-E. Productively participates in meetings  
☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A

III-F. Accepts responsibility and accountability  
☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A

## IV. Planning, Organizing and Achieving Results:

IV-A. Actively seeks ways to improve work systems  
☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A

IV-B. Develops goals, plans, and priorities to achieve program objectives

☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A

IV-C. Meets deadlines in a timely and efficient manner

☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A

IV-D. Evaluates goals and accomplishments

☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A

IV-E. Finds and uses resources well

☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A

**V. Problem Analysis and Decision Making:**

V-A. Anticipates and identifies problems

☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A

V-B. Gathers and analyzes appropriate information before making decisions

☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A

V-C. Seeks advice from others in situations outside own level of expertise

☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A

V-D. Develops and implements effective solutions

☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A

**VI. Commitment to Diversity:**

VI-A. Demonstrates respect for all individuals regardless of their background or culture

☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A

VI-B. Participates in processes that promote diversity and equal opportunity

☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A

VI-C. Advances Affirmative Action policy and initiatives

☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A

**SUPERVISOR CORE COMPETENCIES**

**VII. Fiscal and Human Resource Management:**

VII-A. Promotes positive employee relations and teamwork

☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A

- VII-B. Demonstrates fiscal responsibility and plans and controls expenditures and materials  
☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A
- VII-C. Utilizes employee skills to meet program objectives while maintaining staff productivity and morale  
☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A
- VII-D. Makes effective staffing decisions  
☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A
- VII-E. Manages unit effectively during periods of change  
☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A
- VII-F. Delegates authority and responsibility appropriately  
☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A

#### VIII. Leadership:

- VIII-A. Demonstrates commitment and provides leadership through personal example and professional expertise  
☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A
- VIII-B. Demonstrates ability to motivate staff to meet program objectives  
☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A
- VIII-C. Creates a work climate that encourages employee commitment to organizational goals  
☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A
- VIII-D. Supports an environment of continuous improvement  
☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A
- VIII-E. Serves on university committees and councils  
☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A
- VIII-F. Other factor(s) and comments: Manager's Assessment of Competencies. Include Specific examples and illustrations.

#### IX. Supervision:

- IX-A. Demonstrates awareness of equal opportunity and affirmative action  
☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A
- IX-B. Sets clear goals and expectations for employees  
☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A
- IX-C. Provides adequate support for employees to complete tasks

☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A

IX-D. Provides informal, ongoing feedback to employees  
☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A

IX-E. Provides formal performance evaluation for employees  
☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A

IX-F. Supports the professional development of employees  
☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A

**X. Other Position-Specific Competency:**

**XI. OVERALL EVALUATION RATING:**

XI-A. Select an overall rating for this employee  
☐ Outstanding   ☐ Exceeds Expectations   ☐ Meets Expectations   ☐ Approaches Expectations   ☐ Unsatisfactory   ☐ N/A

**XII. A. PRIOR YEAR GOAL(S):**

XII-B. Prior Year Goal(s) Outcome/Measure

XII-C. Prior Year Goal(s) Timetable

XII-D. Prior Year Goal(s) Status

**XIII. A. GOALS FOR UPCOMING YEAR:**

XIII-B. Upcoming Year Goal(s) Expected Outcome/Measure

XIII-C. Upcoming Year Goal(s) Timetable

XIII-D. Upcoming Year Goal(s) Issues/Comments

Evaluator Comments:

Commented [BJ1]:

Employee Signature \_\_\_\_\_ Date \_\_\_\_\_

Supervisor Signature \_\_\_\_\_ Date \_\_\_\_\_

**Beyond Compliance Training**

IMPORTANT Beyond Compliance Message: Annually, two hours of Beyond Compliance training are required of all staff and strongly encouraged for our TT and FTNTT faculty. The deadline to satisfy Beyond Compliance training is the end of the fiscal year, June 30. It is IMPORTANT to note that one of your two annual Beyond Compliance (BC) hours may be a gender-based discrimination or harassment course. The Title IX Training option may be a facilitator-led session. (Visit [Beyond Compliance](#) for dates and times) or online. To access the online, self-paced Beyond Compliance sessions, please visit [Safe Colleges](#).

Has this employee completed at least two hours of compliance training in the previous fiscal year?

☐ Yes

☐ No (Please comment in "Goals for Completion" below)

☐ In Progress (Please comment in "Goals for Completion" below)

Comments / Goals for Completion

**Additional opportunities for development of staff:**

The university is strongly encouraging our staff to complete trainings regarding **diversity, equity and inclusion**. (Visit [Diversity Education and Training Lab Offerings](#)). In addition, supervisors should provide opportunities for staff to enhance their job-related knowledge and skill set. It is suggested that these goals be a focus in each performance evaluation period going forward. Trainings may involve facilitator-led sessions, webinars, pre-recorded presentations, and other options. (Visit [HR Training & Development Calendar](#)).

1. What specific opportunities have been provided (i.e. trainings your department has organized, requested or supported, etc.) to expand diversity, equity and inclusion capacity/expertise for this staff member?

2. What specific opportunities have been provided (i.e. trainings your department has organized, requested or supported, etc.) to this staff member to enhance their job related knowledge and skill set?

3. What opportunities for promotions might occur over the next three years?

**This section is available in the employee self-evaluation form.**

**SUPPLEMENTAL QUESTIONS:**

1. What did you receive from your supervisor that you felt WAS HELPFUL and assisted you in your ability to perform your job effectively?

2. What did you receive from your supervisor that you felt WAS NOT HELPFUL and inhibited your ability to perform your job effectively?

3. What did you NOT receive from your supervisor that you felt would have been helpful in performing your job more effectively?

4. What specific opportunities have you been provided (i.e. trainings your department has organized, requested or supported, etc.) that expanded your diversity, equity and inclusion capacity/expertise?

5. What professional development opportunities would you like your supervisor to provide to enhance your diversity, equity and inclusion expertise/capacity?

6. What specific professional development opportunities have you been provided to enhance your knowledge and job-related skill set?

7. What professional development opportunities would you like your supervisor to provide to enhance your knowledge and job-related skill set?

8. What promotions or alternate assignments/positions might you seek over the next three years?