



## EMPLOYEE PERFORMANCE ASSESSMENT

|  |                                   |                   |
|--|-----------------------------------|-------------------|
| EMPLOYEE NAME  | POSITION TITLE                    | DEPARTMENT        |
| EMPLOYEE ID#   | PERIOD COVERED BY THIS ASSESSMENT |                   |
|  | From:                             | To:               |
| TYPE OF REVIEW<br><input type="checkbox"/> Mid-probation <input type="checkbox"/> Annual<br><input type="checkbox"/> End of probation <input type="checkbox"/> Other (specify) |                                   | SUPERVISOR'S NAME |

### Purpose

A performance assessment is completed to maintain/improve the quality of a department's function within the University College environment and provides formal documentation of whether an employee is complying with the requirements of their role in the department. It is not a character review/judgment.

### Employee Self-Assessment

Having reviewed the entire contents of the performance assessment package, the employee is required to complete the self-assessment portion prior to returning the package to their supervisor. The self-assessment provides an opportunity for the employee to identify accomplishments during the review period and to establish directions for future activities.

### Instructions

1. The assessment process includes the setting of major goals and objectives for the next review period and allows for the employee to provide comments regarding the appraisal process and the objectives set during the assessment.
2. The supervisor will review and discuss the package with the appropriate administrator.
3. The supervisor will then arrange to meet with the employee to discuss their performance assessment.
4. Once the employee, supervisor, and department administrator have signed the assessment document, a copy is made for the employee to retain, and the original is forwarded to Human Resources.

### Legend:

|                                  |   |
|----------------------------------|---|
| Exceptional:                     | Unique and exceptional accomplishments  |
| Exceeds Expectations:            | Clearly and consistently exceed requirements of the job                         |
| Consistently Meets Expectations: | Consistently meets expectations   |
| Requires Improvements:           | Sometimes acceptable, but not consistent in meeting the requirements of the job |
| Unsatisfactory:                  | Does not meet the minimum requirements of the job                               |

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**Legend**

|   |  |
|---|--|
| <p><b>Job Knowledge</b></p> <ul style="list-style-type: none"> <li>• Understands job duties and responsibilities</li> <li>• Has necessary job skills and knowledge</li> <li>• Has technical skills and knowledge</li> <li>• Understands the department's roles and functions</li> <li>• Keeps current with new developments</li> <li>• Takes advantage of professional development and upgrading opportunities</li> </ul>   | <p><b>Productivity</b></p> <ul style="list-style-type: none"> <li>• Manages a fair workload</li> <li>• Takes on additional responsibilities as needed</li> <li>• Manages priorities</li> <li>• Meets schedules and deadlines</li> <li>• Develops and follows work procedures</li> <li>• Manages time well</li> </ul>   |
| <p><b>Quality</b></p> <ul style="list-style-type: none"> <li>• Is attentive to detail and accuracy</li> <li>• Actively supports quality standards</li> <li>• Makes continuous improvements</li> <li>• Monitors quality level</li> <li>• Provides quality customer service</li> </ul>  | <p><b>Problem Solving</b></p> <ul style="list-style-type: none"> <li>• Anticipates and prevents problems</li> <li>• Defines problems, identifies root cause</li> <li>• Overcomes obstacles</li> <li>• Generates alternative solutions</li> <li>• Handles unusual or unexpected situations thoughtfully</li> <li>• Helps solve team problems</li> <li>• Shows initiative</li> </ul> |
| <p><b>Client Relations</b></p> <ul style="list-style-type: none"> <li>• Professionalism</li> <li>• Discretion, tact, diplomacy</li> <li>• Provides effective client services</li> </ul>   | <p><b>Dependability</b></p> <ul style="list-style-type: none"> <li>• Meets commitments</li> <li>• Works independently</li> <li>• Accepts accountability</li> <li>• Practices confidentiality</li> <li>• Manages change</li> <li>• Stays focused under pressure</li> </ul>  |
| <p><b>Interpersonal Skills</b></p> <ul style="list-style-type: none"> <li>• Listens effectively</li> <li>• Responds clearly and directly</li> <li>• Makes oral and written communication clear and easy to understand</li> <li>• Has a positive attitude</li> <li>• Shows willingness, interest, and enthusiasm</li> </ul>  | <p><b>Teamwork</b></p> <ul style="list-style-type: none"> <li>• Shows commitment to team goals</li> <li>• Exchanges ideas and opinions</li> <li>• Helps prevent and resolve conflict</li> <li>• Works well with other departments</li> <li>• Develops positive working relationships</li> <li>• Is flexible and open-minded</li> <li>• Promotes mutual respect</li> </ul>          |
| <p><b>Legend – Supervisory Responsibilities</b></p>   |  |
| <p><b>Directing/Leading</b></p> <ul style="list-style-type: none"> <li>• Offers leadership and guidance to others in the performance of their duties</li> <li>• Promotes enthusiasm within the team</li> <li>• Shows self-motivation and initiative</li> <li>• Delegates and distributes work assignments fairly</li> <li>• Provides appropriate support, encouragement, and praise</li> <li>• Gives and receives suggestions or constructive criticism in a positive manner</li> <li>• Understands and adheres to established policies and procedures</li> </ul> | <p><b>Planning/Organizing</b></p> <ul style="list-style-type: none"> <li>• Develops realistic plans</li> <li>• Balances short and long-term goals</li> <li>• Aligns plans with organizational goals</li> <li>• Plans for and manages resources</li> <li>• Coordinates and cooperates with others</li> </ul>  |

### Employee Self-Assessment

These questions are guidelines for completing this section. Please comment as much as you wish and feel free to add additional sheets of paper.

What were your most significant work-related accomplishments and/or contributions for this past year? Include committee assignments, projects completed and in progress, skills training or professional development classes, and anything else you think should be recognized. Explain how these accomplishments relate to this past year's goals and objectives.

What areas of your performance have you been most successful?

Are there any aspects of your work where performance could be improved? What could be done by you, your supervisor, or the department/organization to enable improvements?

Describe the changes you could make during the next year that would improve your work performance and enhance your unit's operations.

Has the work-environment factors in the department aided or impeded your ability to achieve your goals? These include physical, environmental, and interpersonal factors. Suggest ways your supervisor or the department managers could help you and your unit work more effectively.

List any training and/or developmental activities that would help you improve your work performance or enhance your career objectives.

List particular goals or achievements you would like to accomplish during the next year. List any guidelines you have set up to assist in achieving your goals. How can your supervisor and the department help you accomplish these?

Does your current job description accurately reflect the duties of your position? If not, how does it need to be amended?

**EMPLOYEE PERFORMANCE FACTORS**

This section describes employee performance on specific factors and is an opportunity for the supervisor to identify successes and areas for improvement relative to specific job-related factors.

**Job Knowledge**

Comments:

**Productivity**

Comments:

**Quality**

Comments:

**Problem Solving**

Comments:

**Dependability**

Comments:

**Interpersonal Skills**

Comments:

**Teamwork**

Comments:

**Summary**

When providing comments, consider the employee's overall performance against objectives from the Employee Performance section above, and note strengths/potential improvements.

- Exceptional
- Exceeds Expectations
- Consistently meets Expectations
- Requires Improvements
- Unsatisfactory

Comments:

**EMPLOYEE PERFORMANCE FACTORS - SUPERVISORY RESPONSIBILITIES**

**Directing/Leading**

Comments:

**Planning/Organizing**

Comments:

**Supervisor's Summary**

When providing comments, consider the employee's overall performance against objectives from the Employee Performance section above, and note strengths/potential improvements.

Rating:

- Exceptional
- Exceeds Expectations
- Consistently meets Expectations
- Requires Improvements
- Unsatisfactory

Comments:

**OBJECTIVES FOR THE UPCOMING REVIEW PERIOD**

This section is to record major goals and objectives for the next review period. In the space provided, specify the objectives and success indicators. These could include University College sponsored PD and training programs as well as other educational or skills training opportunities.

|           |                    |                       |
|-----------|--------------------|-----------------------|
| OBJECTIVE | SUCCESS INDICATORS | TO SUPPORT OBJECTIVES |
| OBJECTIVE | SUCCESS INDICATORS | TO SUPPORT OBJECTIVES |
| OBJECTIVE | SUCCESS INDICATORS | TO SUPPORT OBJECTIVES |

**EMPLOYEE COMMENTS**

Use the following area to make any comments regarding the above appraisal and/or objectives for the next appraisal period. Attach extra sheets if necessary.

Signature of Supervisor \_\_\_\_\_

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

I have read and **accept** this assessment \_\_\_\_\_  
Employee \_\_\_\_\_ Date \_\_\_\_\_

I have read and **disagree** with this assessment \_\_\_\_\_  
Employee \_\_\_\_\_ Date \_\_\_\_\_

Signature of  
 Dept. Administrator \_\_\_\_\_ Position \_\_\_\_\_ Date \_\_\_\_\_