## Foundation Logo wo UT.jpg

## Performance Management Form

Employee Name:       Position Title:

**Supervisor:** **Personnel Number:**

Review Period:       Campus:

RATING DEFINITION

EXCEPTIONAL Consistently exceeds departmental performance expectations to a degree that is obvious to supervisor, customers and peers. Consistently excels in demonstrating the knowledge, skills and abilities that result in the effective performance of the position requirements. Serves as a role model to others. Truly outstanding level of contribution (well beyond position requirements) during the performance period.

### COMMENDABLE Frequently exceeds established departmental performance expectations. Often excels in demonstrating the knowledge, skills and abilities that result in the effective performance of the position requirements.

### SOLID PERFORMER Meets established departmental performance expectations. Demonstrates the knowledge, skills and abilities that result in the effective performance of the position requirements.

### NEEDS IMPROVEMENT\* Does not meet departmental performance expectations on a consistent basis. Does not demonstrate enough of the knowledge, skills and abilities required to perform the job. Meets some of the minimum position requirements. Performance may be uneven or inconsistent, and must be improved. A performance improvement plan is required.

### UNACCEPTABLE\* Does not meet departmental performance expectations. Has not demonstrated the necessary knowledge, skills, abilities and/or commitment. Has not kept pace with job requirements; successes may be occasional; or performance has been deteriorating. Immediate and sustained improvement is needed. A performance improvement plan is required.

*\*If the overall performance rating is “Needs Improvement” or “Unacceptable,” a performance improvement plan must be created. See sample form on HR website. For assistance, please contact the UTFI Office of Human Resources.*

PERFORMANCE FACTORS – This section details how employees perform the job utilizing the descriptors appropriate for their position. Not all factors need to be rated or included in the overall ratings for the section but can be used for developmental purposes.

⮞ **WORK RESULTS** (Accomplishments/Accountability)

 [ ]  **Exceptional (5)** **[ ] Commendable (4)** [ ]  **Solid Performer (3)** [ ]  **Needs Improvement (2)** [ ]  **Unacceptable (1)**

 **5 4 3 2 1 N/A**

Accomplishes job duties effectively [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Work results are accurate\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Work performance is consistent and reliable\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Organizes duties well [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Performs with minimal supervision [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Uses work time and resources efficiently [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Handles fair share of workload [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Handles multiple tasks/activities simultaneously [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Takes responsibility for getting things done/follows through to completion [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Takes initiative [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Delegates as appropriate [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Acts in accordance with job procedures and policies [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Acts as resource for other [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Remains current regarding new developments in area of responsibility [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Meets work schedule/attendance expectations [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Describe actual performance to support ratings including strengths, specific accomplishments, if goals were met, and suggestions for improvement.

⮞ **CUSTOMER SERVICE** (internal/external) (Integrity)

 [ ]  **Exceptional (5) [ ] Commendable (4)** [ ]  **Solid Performer (3)** [ ]  **Needs Improvement (2)** [ ]  **Unacceptable (1)**

 **5 4 3 2 1 N/A**

Seeks customer input appropriately [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Works actively with customers to identify needs [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Takes action to respond to customer needs/concerns [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Responds in a timely and effective manner [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Considers the impact of decisions on customers [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Demonstrates concern for customer needs [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Builds collaborative relationships with customers [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Describe actual performance to support ratings including strengths, specific accomplishments, if goals were met, and suggestions for improvement.

⮞ **TEAMWORK** (Relationships)

[ ]  **Exceptional (5) [ ] Commendable (4)** [ ]  **Solid Performer (3)** [ ]  **Needs Improvement (2)** [ ]  **Unacceptable (1)**

 **5 4 3 2 1 N/A**

Works to enhance team performance [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Respects the opinions of others [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Collaborates [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Provides appropriate feedback to team members [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Maintains harmonious work relationships with team members [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Describe actual performance to support ratings including strengths, specific accomplishments, if goals were met, and suggestions for improvement.

⮞ **PROBLEM SOLVING/DECISION MAKING** (Innovation)

 [ ]  **Exceptional (5) [ ] Commendable (4)** [ ]  **Solid Performer (3)** [ ]  **Needs Improvement (2)** [ ]  **Unacceptable (1)**

 **5 4 3 2 1 N/A**

Analyzes situations to resolve effectively [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Identifies issues, problems and opportunities [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Formulates alternative solutions [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Learns from successes and mistakes [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Effectively establishes priorities [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Adapts/responsive to change/changing priorities/new ideas [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Recognizes when supervisory input is necessary and seeks guidance [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Offers creative suggestions for improvement [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Combines information and ideas in novel ways to produce solutions [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Uses relevant information to diagnose problems [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Identifies key issues/root causes from a variety of quantitative and qualitative data [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Makes appropriate decisions and accepts responsibility for decisions [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Describe actual performance to support ratings including strengths, specific accomplishments, if goals were met, and suggestions for improvement.

⮞ **INTERPERSONAL AND COMMUNICATION SKILLS** (Transparency)

[ ]  **Exceptional (5) [ ] Commendable (4)** [ ]  **Solid Performer (3)** [ ]  **Needs Improvement (2)** [ ]  **Unacceptable (1)**

 **5 4 3 2 1 N/A**

Exhibits positive and professional behavior with co-workers and customers [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Shares information and resources [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Listens attentively [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Seeks clarification to ensure understanding [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Builds effective work relationships within and across departments [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Communicates effectively with supervisors/peers [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Exercises tact, courtesy and respect [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Accepts constructive feedback [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Describe actual performance to support ratings including strengths, specific accomplishments, if goals were met, and suggestions for improvement.

⮞ **DIVERSITY**

Recognizes, values and understands varied perspectives of cultures and backgrounds and respects those differences through inclusion of all. [ ]  YES [ ]  No

Additional comments:

⮞ **LEADERSHIP**

[ ]  **Exceptional (5)** **[ ] Commendable (4)** [ ]  **Solid Performer (3)** [ ]  **Needs Improvement (2)** [ ]  **Unacceptable (1)**

 **5 4 3 2 1 N/A**

Understands and supports the vision of UTFI [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Effectively uses the division/department’s decision making structure [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Seeks opportunities for collaboration with other areas [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Demonstrates business acumen in understanding the environment, diagnosing

strengths and weaknesses and formulating action plans [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Establishes long-range courses of action to accomplish strategic goals [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Describe actual performance to support ratings including strengths, specific accomplishments, if goals were met, and suggestions for improvement.

⮞ **PEOPLE MANAGEMENT (If applicable)**

 [ ]  **Exceptional (5)** **[ ] Commendable (4)**[ ]  **Solid Performer (3)**[ ]  **Needs Improvement (2)** [ ]  **Unacceptable (1)**

 **5 4 3 2 1 N/A**

Coaches employees to improve performance [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Gives effective guidance and feedback to employees [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Recognizes and rewards excellent performance [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Creates a learning environment [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Ensures understanding of departmental goals and employee roles/responsibilities [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Involves others and delegates appropriately [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Deals effectively with others in a conflict situation [ ]  [ ]  [ ]  [ ]  [ ]  [ ]

Describe actual performance to support ratings including strengths, specific accomplishments, if goals were met, and suggestions for improvement.

|  |
| --- |
| **PROFESSIONAL DEVELOPMENT** |
| **List all training sessions, conferences, and seminars attended for the Evaluation Period:**      |

|  |
| --- |
| **OTHER ACCOMPLISHMENTS: Use this section to identify any development goals or special onetime accomplishments that went beyond the regular job expectations and are not covered elsewhere in this document** |
|       |

|  |
| --- |
| **ACTION STEPS: List goals/objectives for the next review period** |
| **Objective** | **Action Steps** | **Target Date** |
|       |       |       |
|       |       |       |
|       |       |       |
|       |       |       |

**OVERALL ANNUAL RATING: (Check ONLY one rating):**

[ ]  **EXCEPTIONAL** (5) Consistently exceeds departmental performance expectations to a degree that is obvious to supervisor, customers and peers. Consistently excels in demonstrating the knowledge, skills and abilities that result in the effective performance of the position requirements. Serves as a role model to others. Truly outstanding level of contribution (well beyond position requirements) during the performance period.

[ ]  **COMMENDABLE** (4) Frequently exceeds established departmental performance expectations. Often excels in demonstrating the knowledge, skills and abilities that result in the effective performance of the position requirements.

[ ]  **SOLID PERFORMER** (3) Meets established departmental performance expectations. Demonstrates the knowledge, skills and abilities that result in the effective performance of the position requirements.

[ ]  **NEEDS IMPROVEMENT** (2) Does not meet departmental performance expectations on a consistent basis. Does not demonstrate enough of the knowledge, skills and abilities required to perform the job. Meets some of the minimum position requirements. Performance may be uneven or inconsistent, and must be improved. A performance improvement plan is required.

[ ]  **UNACCEPTABLE** (1) Does not meet departmental performance expectations. Has not demonstrated the necessary knowledge, skills, abilities and/or commitment. Has not kept pace with job requirements; successes may be occasional; or performance has been deteriorating. Immediate and sustained improvement is needed. A performance improvement plan is required.

**COMMENTS:**

**Employee’s Signature:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Supervisor’s Name:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Supervisor’s Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_