

**ST. THOMAS UNIVERSITY PERFORMANCE ASSESSMENT FORM**

**DATE:**

**Name:**

**Position:**

**Department:**

**Part 1: Rating of Key Performance Factors:**

**Rating Codes:** Check the rating that most appropriately describes performance for each factor.

<b>Performance Does NOT Meet Expectations</b>	<b>Performance Needs Some Improvement</b>	<b>Performance Meets or Exceeds Expectations</b>
The performance factor is not achieved in a satisfactory manner. Immediate and on-going attention needs to be given to ensure performance improves. Performance is inconsistent and unacceptable.	Performance inconsistencies exist. The performance factor is not routinely achieved in a satisfactory manner. Although some attention is required to improve, the employee demonstrates an ability and potential for improvement.	Performance meets or exceeds position requirements in terms of results achieved. Functions under expected levels of guidance and/or supervision and exhibits behaviour/skills that consistently meet or exceed expectations.

**Key Performance Factors: Each key performance factor (i.e., Professionalism) includes several points to help define or describe the factor in more detail. It is NOT necessary, or expected, that the supervisor or employee comment on each point when providing reasons for the rating.**

- 1) **Professionalism:** Does the employee demonstrate punctuality when reporting to work? Adhere to work breaks? Display a professional attitude towards his/her work? Willingly accept direction? Collaborate with others to achieve team goals? Respond well to constructive criticism? Is the employee flexible, adapting quickly to changing situations? How is his/her attendance? Does the employee cope with her/his own stress and that of others in a constructive manner? Is the employee accountable for all tasks/responsibilities as outlined within his/her job description?

Rating:             Does NOT Meet Expectations             Needs Some Improvement             Meets or Exceeds Expectations

Reasons for rating (examples are welcomed):

2) **Initiative:** Is the employee a self-starter who takes necessary action on his/her own? Does the employee take on additional work upon completion of tasks? Seek advice or guidance from experts when necessary? Approach career/personal development energetically by seeking out new information and acquiring new skill sets?

Rating:  Does NOT Meet Expectations  Needs Some Improvement  Meets or Exceeds Expectations

Reasons for rating (examples are welcomed):

3) **Collegiality & Service Orientation:** Does the employee respond quickly and pleasantly to internal service requests? Understand how her/his position and related responsibilities affect the overall unit? Maintain effective working relationships with other departments and individuals? Build and maintain external relationships, both formal and informal, that positively impact her/his job and the University's success? Is the employee personally committed to providing client satisfaction?

Rating:  Does NOT Meet Expectations  Needs Some Improvement  Meets or Exceeds Expectations

Reasons for rating (examples are welcomed):

4) **Communication:** Does the employee present information and ideas in a clear, articulate and accurate manner? Listen actively and effectively to understand the details and interpret the message correctly? Openly share opinions, ideas and relevant information with team members? Communicate positively and effectively to ensure the receiver of the information has a full understanding of what is being said or written?

Rating:  Does NOT Meet Expectations  Needs Some Improvement  Meets or Exceeds Expectations

Reasons for rating (examples are welcomed):

5) **Planning & Organization:** Does the employee anticipate obstacles and develop alternative plans and solutions? Establish specific, realistic and challenging objectives? Follow up on all areas of responsibility in a timely and thorough manner? Does he/she recognize needs and set priorities and schedules as required? Work through problems systematically and collect adequate facts? Maintain good administrative procedures to ensure reports and communications are accurate and on time?

Rating:  Does NOT Meet Expectations  Needs Some Improvement  Meets or Exceeds Expectations

Reasons for rating (examples are welcomed):

6) **Analysis & Problem Solving:** Does the employee demonstrate focus and a sense of responsibility to resolve problems? Analyze and solve problems with accuracy and timeliness? Strive to find better ways of doing things by rethinking established work methods?

Rating:  Does NOT Meet Expectations  Needs Some Improvement  Meets or Exceeds Expectations

Reasons for rating (examples are welcomed):

7) **Decision Making & Judgment:** Does the employee perform effectively under pressure? Identify sound alternatives? Take action in a timely and responsible manner? Analyze the impact of different solutions considering time, resources and cost? Is the employee open to new ideas? Do the employee's personal views adversely affect her/his judgement? Is the employee able to say no diplomatically and decisively? Do the employee's decision-making ability and sound judgment lead to positive results?

Rating:  Does NOT Meet Expectations  Needs Some Improvement  Meets or Exceeds Expectations

Reasons for rating (examples are welcomed):

8) **Productivity & Efficiency:** Does the employee consistently meet deadlines with quality and reliability? Effectively manage his/her time? Has the employee mastered the tools required to perform the job function? Does he/she learn and adapt to new concepts and tools? Bring new ideas and approaches to work situations, and think creatively despite limited resources or time?

Rating:  Does NOT Meet Expectations  Needs Some Improvement  Meets or Exceeds Expectations

Reasons for rating (examples are welcomed):

9) **Results Orientation:** Does the employee produce individual results that are aligned with the University's top priorities? Clearly demonstrate an understanding that he/she is responsible for both their individual and team results? Does the employee work to ensure that her/his efforts to produce superior results do not come at the expense of colleagues or team members? If applicable, does the employee's effective leadership of his/her team produce strong team results?

Rating:  Does NOT Meet Expectations  Needs Some Improvement  Meets or Exceeds Expectations

Reasons for rating (examples are welcomed):

10) **Leadership (if applicable):** Does the employee act as a role model for his/her team members and colleagues within the University? Does he/she influence and persuade team members to accept new ideas? Address and resolve conflict with integrity and sensitivity? Utilize interpersonal skills to handle different personalities effectively? Does he/she empower employees, take an active interest in their growth, and collaborate with them on their career development plans? Does the employee provide his/her employees with fair and constructive feedback, identifying their strengths and opportunities for improvement? Does he/she assume responsibility for personal and team decisions?

- Rating:     Does NOT Meet Expectations                       Needs Some Improvement                       Meets or Exceeds Expectations
- N/A (Use this rating if the employee is NOT in a supervisory position)

Reasons for rating (examples are welcomed):

Part 2: Review of Accomplishments for Review Period and Objectives for Coming Year:

Specific Accountabilities for Employee's Position	Results and Achievements for the Review Period	Objectives for Coming Year

Part 3: Education and Development Plan for Employee:

Learning Objectives	Method of Achievement and Timeline	Indicators of Achievement of Objective

Part 4: Overall Rating of Performance & Salary Step Recommendation:

<u>Overall Rating and Recommendation</u>	<u>General Comments and Reasons for Overall Rating/Recommendation</u>
<p><input type="checkbox"/> Meets or Exceeds Expectations I recommend this employee move to the next step in his/her salary scale at this time.</p> <p><input type="checkbox"/> Needs Improvement I DO / DO NOT (circle which applies) recommend this employee move to the next step in his/her salary scale at this time.</p> <p><input type="checkbox"/> Does NOT Meet Expectations I do not recommend this employee move to the next step in his/her salary scale at this time.</p>	

Part 5: Employee's Comments:

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

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

Reviewer Name: \_\_\_\_\_

Reviewer Position: \_\_\_\_\_

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

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

***Copy MUST be returned to HR for file***