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###### **PERFORMANCE MANAGEMENT PROGRAM**

###### **Planning and Evaluation Form**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Evaluation Period: | From: | Date employee’s performance cycle began | To: | Date employee’s performance cycle ended | |  | |
| Campus Box: | Enter the campus mailing address | | | |  |  | |
| Employee Name: | Please enter employee’s First and Last name | | | | | Employee 6-digit ID #: | **Always enter Empl ID** |
| Job Title: | Enter the employee’s current job title | | | | | Position #: | Find position # on the PDQ |
| Work Unit: | Enter dept or work unit name | | | | | Department ID #: | Enter the 5 digit dept code |
| Supervisor Name: | Person officially responsible for supervision of this employee. | | | | | Position #: | Enter supervisor position # |
| Reviewer Name: | *Must be a person different than the supervisor.* | | | | | Position #: | Enter reviewer position # |
| Decision  Making Authority: | Enter the designated appointing authority over the employee. | | | | | Position #: | Enter Apptg Auth pos # |
|  |  | | | | |  |  |

**PERFORMANCE MANAGEMENT PLANNING SECTION**

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| --- | --- | --- | --- | --- | --- | --- |
| This position P.D.Q. (job description) was reviewed by the supervisor and is current and accurate. | | | | |  |  |
| This position supervises Classified Staff. A supervisory factor is included as a goal/objective. | | | | |  |  |
| Supervisor Signature: | You may sign via Docusign or by hand | | | Date: | Date evaluation is signed | |
| Reviewer Signature: | You may sign via Docusign or by hand | | | Date: | Date evaluation is signed | |
| **EMPLOYEE MUST CHECK ONE:** | |  |  | | | |
| Employee Signature: | You may sign via Docusign or by hand | | | Date: | Date evaluation is signed | |
|  | | | | | | |

**COACHING AND PROGRESS REVIEW SECTION**

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| --- | --- | --- | --- | --- | --- | --- | --- |
| At least one coaching, or progress review, meeting is required for each evaluation period; more are recommended. Indicate the date each meeting was held. Both the supervisor and employee should initial next to each date. The coaching/progress review notes page of this form provides space for documenting the issues discussed during the year. | | | | | | | |
| Date: | Date of the first progress review or **90 day performance discussion for probationary employees** | | Supervisor’s Initials: | Type or sign initials | Employee’s Initials: | | Type or sign initials |
| Date: | Date of the second progress review | | Supervisor’s Initials: | Type or sign initials | Employee’s Initials: | | Type or sign initials |
| Date: | Date of the third progress review | | Supervisor’s Initials: | Type or sign initials | Employee’s Initials: | | Type or sign initials |
|  | |  | |  | |  | |

**EVALUATION RATING SECTION**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Final Rating (1-5)** | **Conversion of Total Numeric Score to Descriptive Rating** | | | | |
|  | 100-149  Unacceptable  (Level 1) | 150-249  Need Improvement  (Level 2) | 250-349  Effective  (Level 3) | 350-449  Highly Effective  (Level 4) | 450-500  Exceptional  (Level 5) |

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

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

**EMPLOYEE MUST CHECK ONE:  I agree with this evaluation  I disagree with this evaluation.**

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

Note: checking ‘I disagree’ does not automatically prompt, nor does checking ‘I agree’ preclude one from, pursuing the dispute resolution process. For more information, please see the dispute resolution process document on the last page of this form.

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| **University of Colorado Anschutz Medical Campus**  **Mission of the University**  The University of Colorado Anschutz Medical Campus is a diverse teaching and learning community that creates, discovers, and applies knowledge to improve the health and well-being of Colorado and the World. |
| **The Mission of the Work Unit**  Input the stated mission of the work unit in which the employee works. |
| **The Role of This Position**  The position’s role in the accomplishment of the mission and objectives of the work unit and the campus is to:  (Use question 1.C, "Briefly summarize the purpose of this position," from the PDQ or similar information from the job description.)  Input position’s role in the accomplishment of the mission and objectives of the work unit and the campus. |

**Key to Rating Level**

**Definition of Level 5 (Exceptional):** Employees at this level consistently make extraordinary contributions through superior performance on key goals, serve as a role model of organizational values, and contribute significantly to the mission of the Department. Peers, immediate supervisors, higher-level management, and others recognize and depend upon the employee’s level of performance. An extraordinary level of achievement and commitment in terms of quality and time, technical skills and knowledge, ingenuity, creativity, and initiative are exhibited at this level. The employee demonstrates exceptional job mastery in all major areas of responsibility and their contributions to the organization are of marked excellence.

**Definition of Level 4: (Highly Effective):** Employees at this level demonstrate highly effective performance by making significant contributions and impact on the goals of the Department. The employee consistently models organizational values to others and performance at this level exceeds the expectations of their position. Colleagues rely on these employees for advice on process or subject matter expertise. All goals, objectives, and targets are consistently achieved above the established standards.

**Definition of Level 3: (Effective):** Employees at this level reliably and consistently meet all the expectations, standards, requirements, and objectives of the employee’s position. They demonstrate organizational values, along with a willingness and ability to grow for the benefit of the Department. At this level, performance meets expectations in terms of quality of work, efficiency, and timeliness with the most critical goals being met.

**Definition of Level 2: (Needs Improvement):** At this level, employee performance and/or behavior do not consistently meet minimum expectations of what is expected of the employee’s position. While the employee shows capability and willingness to progress, they may require development in a key skill area(s) to be fully effective in the role. The employee’s failure to exhibit marked improvement may result in performance management.

**Definition of Level 1: (Unacceptable):** At this level, employee performance and/or behavior do not meet minimum job expectations of the position. The employee does not meet key goals and/or does not demonstrate competence in critical job skills. Immediate and sustained performance improvement is needed. The employee’s failure to exhibit immediate marked improvement will result in corrective and/or disciplinary action.

**GOALS AND OBJECTIVES ASSOCIATED WITH SUCCESS IN THIS POSITION**

**“Goal or objective”** is a specific statement or requirement.

**“Measurement method”** reflects the evaluation basis for the expected results.

**“Results achieved”** are the accomplishments of the employee during the evaluation period.

**“Weight”** is the percentage of that goal to the overall score (enter as a decimal value; e.g., 0.20).

**“Rating”** of 1.00 to 5.00 (decimals are permitted, e.g., 4.75)

|  |  |  |  |
| --- | --- | --- | --- |
| **1** | **Goal or objective:** Describe the goal or objective in terms of the intended outcome. | **Results achieved: Describe the results achieved.** | **Select One of the Below Ratings**  Level 5 – Exceptional  Level 4 – Highly Effective  Level 3 – Effective  Level 2 – Needs Improvement  Level 1 - Unacceptable |
| **Measurement method:** Enter level 3, 4, and 5 measurement methods. |
| **Weight of goal or objective:** **0.00** | **Goal or objective rating:**  **0.00** |

|  |  |  |  |
| --- | --- | --- | --- |
| **2** | **Goal or objective:** Describe the goal or objective in terms of the intended outcome. | **Results achieved: Describe the results achieved.** | **Select One of the Below Ratings**  Level 5 – Exceptional  Level 4 – Highly Effective  Level 3 – Effective  Level 2 – Needs Improvement  Level 1 - Unacceptable |
| **Measurement method:** Enter level 3, 4, and 5 measurement methods. |
| **Weight of goal or objective:** **0.00** | **Goal or objective rating:**  **0.00** |

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| --- | --- | --- | --- |
| **3** | **Goal or objective:** Describe the goal or objective in terms of the intended outcome. | **Results achieved: Describe the results achieved.** | **Select One of the Below Ratings**  Level 5 – Exceptional  Level 4 – Highly Effective  Level 3 – Effective  Level 2 – Needs Improvement  Level 1 - Unacceptable |
| **Measurement method:** Enter level 3, 4, and 5 measurement methods. |
| **Weight of goal or objective:** **0.00** | **Goal or objective rating:**  **0.00** |

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| --- | --- | --- | --- |
| **4** | **Goal or objective:** Describe the goal or objective in terms of the intended outcome. | **Results achieved: Describe the results achieved.** | **Select One of the Below Ratings**  Level 5 – Exceptional  Level 4 – Highly Effective  Level 3 – Effective  Level 2 – Needs Improvement  Level 1 - Unacceptable |
| **Measurement method:** Enter level 3, 4, and 5 measurement methods. |
| **Weight of goal or objective:** **0.00** | **Goal or objective rating:**  **0.00** |

|  |  |  |  |
| --- | --- | --- | --- |
| **5** | **Goal or objective:** Describe the goal or objective in terms of the intended outcome. | **Results achieved: Describe the results achieved.** | **Select One of the Below Ratings**  Level 5 – Exceptional  Level 4 – Highly Effective  Level 3 – Effective  Level 2 – Needs Improvement  Level 1 - Unacceptable |
| **Measurement method:** Enter level 3, 4, and 5 measurement methods. |
| **Weight of goal or objective:** **0.00** | **Goal or objective rating:**  **0.00** |

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| --- | --- | --- | --- |
| **6** | **Goal or objective:** Describe the goal or objective in terms of the intended outcome. | **Results achieved: Describe the results achieved.** | **Select One of the Below Ratings**  Level 5 – Exceptional  Level 4 – Highly Effective  Level 3 – Effective  Level 2 – Needs Improvement  Level 1 - Unacceptable |
| **Measurement method:** Enter level 3, 4, and 5 measurement methods. |
| **Weight of goal or objective:** **0.00** | **Goal or objective rating:**  **0.00** |

|  |  |  |  |
| --- | --- | --- | --- |
| **7** | **Goal or objective:** Describe the goal or objective in terms of the intended outcome. | **Results achieved: Describe the results achieved.** | **Select One of the Below Ratings**  Level 5 – Exceptional  Level 4 – Highly Effective  Level 3 – Effective  Level 2 – Needs Improvement  Level 1 - Unacceptable |
| **Measurement method:** Enter level 3, 4, and 5 measurement methods. |
| **Weight of goal or objective:** **0.00** | **Goal or objective rating:**  **0.00** |

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| --- | --- | --- | --- |
| **8** | **Goal or objective:** Describe the goal or objective in terms of the intended outcome. | **Results achieved: Describe the results achieved.** | **Select One of the Below Ratings**  Level 5 – Exceptional  Level 4 – Highly Effective  Level 3 – Effective  Level 2 – Needs Improvement  Level 1 - Unacceptable |
| **Measurement method:** Enter level 3, 4, and 5 measurement methods. |
| **Weight of goal or objective:** **0.00** | **Goal or objective rating:**  **0.00** |

**Include only if position supervises classified staff**

|  |  |  |  |
| --- | --- | --- | --- |
| **9** | **Supervisor Accountability Goal:** All supervisors of classified staff are responsible for:   * Completing performance planning & goal setting. * Conducting midyear progress review. * Completing and documenting performance discussion after completion of 90 days of Probationary Period**.** * Completing End-of-Cycle Performance Review/Evaluation.   Supervisors who do not comply will be subject to sanctions including corrective action, ineligibility for merit pay, and/or suspension. | **Results achieved:** Describe the results achieved. | Select One of the Below Ratings  Level 5 – Exceptional  Level 4 – Highly Effective  Level 3 – Effective  Level 2 – Needs Improvement  Level 1 - Unacceptable |
| **Measurement method:** Enter level 3, 4, and 5 measurement methods. |
| **Weight of goal or objective:** **0.00** | **Goal or objective rating:**  **0.00** |

**CORE COMPETENCIES**

The following core competencies have been defined by the State Personnel Director for inclusion in the performance plans of every employee classified in the State Personnel System. Mastery of the core competencies will vary depending upon the background and duties of an employee. There is space, “**OTHER**,” to add position specific factors if there is need to do so. A score for each competency is required. “**Results achieved**,” need be included and should support the indicated rating. Decimals may be used when determining ratings (i.e., 3.25). For examples of Measurement Methods, see last two pages of form.

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| --- | --- | --- | --- |
| **1** | **Communication:** The employee effectively communicates by actively listening and sharing relevant information with co-workers, super-visor(s), students, and other internal/external constituents to anticipate problems and ensure effectiveness of the University or campus. | Results achieved:  **Describe the results achieved.** | Select One of the Below Ratings  Level 5 – Exceptional  Level 4 – Highly Effective  Level 3 – Effective  Level 2 – Needs Improvement  Level 1 - Unacceptable |
| **Measurement Factors:**  Demonstrates good listening skills.  Uses appropriate language and terminology.  Speaks in a manner that will be understood, is courteous, and effective.  Communicates to ensure others are informed and current.  Is considerate of the communication skills of others.  OTHER | **Goal or objective rating:**  **0.00** |
| **Weight of core competency:** **0.00** |
|  |  |  |  |
| **2** | **Interpersonal Skills:** The employee interacts effectively with others to establish and maintain smooth working relations. | Results achieved:  **Describe the results achieved.** | Select One of the Below Ratings  Level 5 – Exceptional  Level 4 – Highly Effective  Level 3 – Effective  Level 2 – Needs Improvement  Level 1 - Unacceptable |
| **Measurement Factors:**  Maintains smooth working relations with others.  Is helpful and supportive of others, as necessary.  Is understanding of the feelings and needs of co-workers and others.  Contributes to maintaining a high level of morale and motivation.  Is appreciative of the diversity of coworkers, customers, students, and visitors.  Supports the institution’s commitment to diversity.  OTHER | **Goal or objective rating:**  **0.00** |
| **Weight of core competency:** **0.00** |
|  |  |  |  |
| **3** | **Accountability:** The employee demonstrates responsible personal and professional conduct, which contributes to the overall goals and objectives of the University or campus. | Results achieved:  **Describe the results achieved.** | Select One of the Below Ratings  Level 5 – Exceptional  Level 4 – Highly Effective  Level 3 – Effective  Level 2 – Needs Improvement  Level 1 - Unacceptable |
| **Measurement Factors**:  Complies with unit policies relating to attire or dress code.  Uses breaks and break times appropriately.  Avoids conducting personal business during work hours.  Represents the work unit to others in person, by phone, e-mail, etc. in a credible manner.  Complies with institutional policies and procedures.  Complies with work unit standards for requesting leave and calling in sick.  Accepts schedule changes and responds to special situations.  OTHER | **Goal or objective rating:**  **0.00** |
| **Weight of core competency:** **0.00** |

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| **4** | **Job Knowledge:** The employee is skilled in job-specific knowledge which is necessary to provide the appropriate quantity and quality of work in a timely and efficient manner. | Results achieved:  **Describe the results achieved.** | Select One of the Below Ratings  Level 5 – Exceptional  Level 4 – Highly Effective  Level 3 – Effective  Level 2 – Needs Improvement  Level 1 - Unacceptable |
| **Measurement Factors:**  Demonstrates the necessary knowledge, skills, and abilities to complete work assignments.  Meets deadlines in completing work assignments.  Quality of work meets or exceeds the expected standard of performance.  Work efforts and product contribute to a higher quality environment.  Consistently meets or exceeds performance expectations.  OTHER | **Goal or objective rating:**  **0.00** |
| **Weight of core competency:** **0.00** |
|  |  |  |  |
| **5** | **Customer Service:** The employee works effectively with internal/external constituents to satisfy service expectations. | Results achieved:  **Describe the results achieved.** | Select One of the Below Ratings  Level 5 – Exceptional  Level 4 – Highly Effective  Level 3 – Effective  Level 2 – Needs Improvement  Level 1 - Unacceptable |
| **Measurement Factors:**  Provides prompt and friendly service to internal and external customers.  Helps identify customer needs through courteous questioning and a sincere desire to be helpful.  Follows up with customers, as appropriate, to ensure satisfaction.  Considers and recommends alternatives to customers as appropriate.  Is as helpful with telephone contacts as with in-person interactions.  Participates in Campus and/or community service projects as appropriate.  OTHER | **Goal or objective rating:**  **0.00** |
| **Weight of core competency:** **0.00** |
|  |  |  |  |
| **6** | **Extra Core Competency (if needed):** | Results achieved:  **Describe the results achieved.** | Select One of the Below Ratings  Level 5 – Exceptional  Level 4 – Highly Effective  Level 3 – Effective  Level 2 – Needs Improvement  Level 1 - Unacceptable |
| **Measurement Factors:**  Enter priority performance factors  Enter priority performance factors  Enter priority performance factors  Enter priority performance factors  Enter priority performance factors | **Goal or objective rating:**  **0.00** |
| **Weight of core competency:** **0.00** |

**Instructions for Completing the Summary of Performance table:**

**For Performance Plan**:

* In the section, “**GOALS AND OBJECTIVES ASSOCIATED WITH SUCCESS IN THIS POSITION**,” develop goals or objectives and standards of measure for the work required in the position. These should be the highest priority factors of performance required by the work unit (some rows may not be required).
* In the section for **“CORE COMPETENCIES,”** check all factors that apply to the position. These competencies are mandated by the State Personnel Board for all classified employees.
* Assign a weight to each goal or objective, and to each core competency (each core competency must have a weight of at least 1), to identify its relative value to performance by the position. Note that the sum for all weights must equal one hundred (100).

**For Performance Evaluation:**

* **Results Achieved**: Relative to the stated goals or objectives, and core competencies, provide specific detail of the employee’s achievements that support the rating that has been earned.
* In each section, assign a **Goal or Objective Rating** (1.00 to 5.00) corresponding to the employee’s level of achievement in the corresponding goal or objective, and core competency. For guidance refer to the definitions stated in the “**Key to Rating Level”** (page 3).
* In the below **“SUMMARY OF PERFORMANCE”** table, duplicate the weights and ratings from the corresponding goals or objectives and core competencies in the above sections of the form. Multiply the weights and ratings and enter the results into the column labeled, **“Numeric Score.”**
* Enter the sum of the **“Numeric Scores”** in the box to the right of the label, “**Total Numeric Score.”** Using the scale in the conversion table below, convert the Total Numeric Score to an overall rating (1 – 5) and enter the rating in the box for **“Final Rating.”** Copy this same rating to the box on page one of the form labeled, **“Final Rating.”**

**SUMMARY OF PERFORMANCE**

|  |  |  |  |
| --- | --- | --- | --- |
| **GOAL OR OBJECTIVE** | **Weight** | **Numeric Equivalent of Rating**  **(1 – 5)** | **Numeric Score** |
| Goal or Objective 1 | 0.00 | 0.00 | 0.00 |
| Goal or Objective 2 | 0.00 | 0.00 | 0.00 |
| Goal or Objective 3 | 0.00 | 0.00 | 0.00 |
| Goal or Objective 4 | 0.00 | 0.00 | 0.00 |
| Goal or Objective 5 | 0.00 | 0.00 | 0.00 |
| Goal or Objective 6 | 0.00 | 0.00 | 0.00 |
| Goal or Objective 7 | 0.00 | 0.00 | 0.00 |
| Goal or Objective 8 | 0.00 | 0.00 | 0.00 |
| Goal or Objective 9 | 0.00 | 0.00 | 0.00 |
| Communication | 0.00 | 0.00 | 0.00 |
| Interpersonal Skills | 0.00 | 0.00 | 0.00 |
| Accountability | 0.00 | 0.00 | 0.00 |
| Job Knowledge | 0.00 | 0.00 | 0.00 |
| Customer Service | 0.00 | 0.00 | 0.00 |
| Extra Core Competency (if needed) | 0.00 | 0.00 | 0.00 |
| **TOTAL** |  | **Total Numeric Score ->** | **0.00** |
| **MUST EQUAL 100** | **Final Rating ->** | 0 |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Conversion of Total Numeric Score to Descriptive Rating** | | | | |
| 100-149  Unacceptable  (Level 1) | 150-249  Needs Improvement  (Level 2) | 250-349  Effective  (Level 3) | 350-449  Highly Effective  (Level 4) | 450-500  Exceptional  (Level 5) |

**NARRATIVES:**

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| Training Plans: Enter plans for this evaluation cycle. |

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| Planning Narrative: Enter plans as they are developed throughout the evaluation cycle. |

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| Evaluation Narrative: In addition to the “**results achieved**” written above, use this space to summarize the employee’s overall achievement. |

**COACHING/PROGRESS REVIEW NOTES:**

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| Date: Enter date  Issues Discussed: Detail important items discussed. If this is the mid-cycle progress review, what would be the overall year-to-date evaluation rating? |
| Date: Enter date  Issues Discussed: Detail important items discussed. If this is the mid-cycle progress review, what would be the overall year-to-date evaluation rating? |
| Date: Enter date  Issues Discussed: Detail important items discussed. If this is the mid-cycle progress review, what would be the overall year-to-date evaluation rating? |

**DISPUTE RESOLUTION PROCESS**

This overview of the Dispute Resolution Process is an abbreviated version of the formal process that is available in its entirety at your campus Human Resources department. Before initiating this process, you are encouraged to have a meeting with your supervisor to identify and possibly rectify the issue about which you are concerned.

**What Issues are Disputable?**

The State Personnel Director has defined the specific performance management matters that may be disputed by an employee and has specified the stages at which these matters will be reviewed. They are:

1. The individual final overall performance evaluation, including lack of a final overall evaluation.
2. The application of the university’s performance management program to the individual employee’s plan and/or final overall evaluation

Please note that the first issue must be decided at the first stage and is **not reviewable further.** Issue 2, if not resolved at the campus level, is reviewable at the second stage.

**What Issues are Not Disputable?**

1. The content of the University’s performance management program (or an approved campus modification of the program).

2. Matters related to the funds appropriated.

3. The performance evaluations and merit pay of *other* employees.

**First Stage—Internal: University of Colorado Campus Level**

To initiate the internal review process, the employee must submit a review request on the standard university form to the Decision-Making Authority. When disputing the individual final overall performance evaluation rating, the written request must be filed within five (5) working days after the meeting at which the rater formally presents the employee with his/her final overall performance evaluation and during which the employee and rater discuss the performance rating. Copies of the written request must be submitted to the supervisor and to Employee Relations and Performance ([PerformanceManagement@cuanschutz.edu](mailto:PerformanceManagement@cuanschutz.edu)).

Unless there are extraordinary circumstances, the Decision-Making Authority or designee must, within five (5) working days from receipt of the form, meet with the employee, the supervisor, and with any other persons whom the employee or the supervisor deem to have pertinent information. The Decision-Making Authority remains responsible for scheduling the meeting with the affected parties and for adhering to the schedule for completion of the review**.** After the meeting, the Decision-Making Authority has five working days to render a decision.

**Second Stage—External: State Personnel Director**

The second stage applies to issue 2 only. If unsatisfied with the decision of the Decision-Making Authority the employee may file a written request for external review with the State Personnel Director within five working days from the date the internal decision is received. This request must be submitted on the standard Consolidated Appeal/Dispute Form available from Employee Relations and Performance. Mail, hand-deliver, or fax the form to:

State Personnel Board

1525 Sherman Street, 4thFloor

Denver, CO 80203

Fax: 303-866-5038

The request must include a copy of the original written performance management issue(s) raised by the employee and the final written decision from the internal review stage. A copy of this written request also must be sent to Employee Relations and Performance ([PerformanceManagement@cuanschutz.edu](mailto:PerformanceManagement@cuanschutz.edu)).

This request will be screened based upon specific criteria established by the State Personnel Director, and if it is determined that further review is not warranted, that decision is final, and binding and the employee will be notified accordingly. If, however, further review is warranted, the Director shall select a qualified neutral third party to review the decision who must within thirty days issue a written decision, which is final and binding.

Examples of Core Competency Measures

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| Following are examples of the types of measures that may be included in planning Core Competency performance. It should be understood between the supervisor and employee that while efforts are made at describing qualities of performance, for the most part, competencies are observed and evaluated by the supervisor. When measures are created an effort should be made to describe the three levels of acceptable performance. As performance criteria are developed consideration should be given to the classification of the position and the types of expectations that exist for that type and level of work. Consideration should first be given to performance expectations at the “Effective” level (level 3). “Effective” performance is that level that satisfies the requirements of the position. Measures are then created for the two higher levels of performance (levels 4 and 5). Typically, “Exceptional” (level 5) requires higher levels of skill, knowledge, and/or effort for the classification of the position. |

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| **Communication:** The employee effectively communicates by actively listening and sharing relevant information with co-workers, supervisor(s) and students and other external constituents to anticipate problems and ensure effectiveness of the University or campus. |

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| --- | --- |
| Effective (level 3) | Highly Effective (level 4) to Exceptional (level 5) |
| * Writing skills meet the needs of the assignment. | * Writing skills are substantially beyond expectations. |
| * Oral Communication skills meet the needs of the assignment. | * Oral Communication skills are substantially beyond expectations. |
| * Messages are relayed in a professional and courteous manner | * Anticipates problems and takes necessary action with appropriate individuals. |
|  | * Employee follows up to ensure that messages are received and understood. |

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| **Interpersonal Skills:** The employee interacts effectively with others to establish and maintain smooth working relations. |

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| --- | --- |
| Effective (level 3) | Highly Effective (level 4) to Exceptional (level 5) |
| * The employee is pleasant and courteous in all interactions. | * The employee is willing to extend him/herself in providing help during crunch times, is flexible and accommodating. |
| * The employee establishes and maintains relationships that are appropriate for the level and type of work. | * Makes continuous effort to ensure that relationships are not only maintained but fostered and supported. |
| * Rarely involved in interpersonal disputes or customer conflicts. | * Resolves interpersonal conflicts without assistance. |
|  | * Demonstrates extra effort to maintain more complicated relationships. |

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| **Accountability:** The employee demonstrates responsible personal and professional conduct, which contribute to the overall goals and objectives of the University or campus. |

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| --- | --- |
| Effective (level 3) | Highly Effective (level 4) to Exceptional (level 5) |
| * The employee accepts responsibility for actions, work, and behavior. | * The employee takes independent action within the expectations of the work assignment but understands limitations of independent action. |
| * The employee accomplishes assignments within established time frames. | * The employee frequently completes assignments well before deadlines or due dates without a loss of quality or quantity. |
| * The employee is reliable in attendance and attention to work rules. |  |
| * The employee uses equipment and resources appropriately |  |
| * Is flexible regarding work hours and assignment changes. |  |

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| **Job Knowledge:** The employee is skilled in job-specific knowledge which is necessary to provide the appropriate quantity and quality of work in a timely and efficient manner. |

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| --- | --- |
| Effective (level 3) | Highly Effective (level 4) to Exceptional (level 5) |
| * The employee has acquired the skills and knowledge necessary for the assignment. | * Asks for additional training for the purpose of enhancing job knowledge and skill |
| * Develops new job knowledge or skills as changes occur or as necessary. | * Is able to mentor/train others on skills and knowledge of the assignment |
|  | * Identifies methods for enhancing accomplishment of the assignment and makes recommendations to the supervisor. |

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| **Customer Service:** The employee works effectively with internal/external constituents to satisfy service expectations. |

Note: Complaints should not be used as a primary determinant in evaluating this factor. Work units may wish to provide customer service training to employees to identify service problems and develop strategies for dealing with them. Work units may also choose to develop a survey or questionnaire for customers to complete in assessing the quality of service provided.

|  |  |
| --- | --- |
| Effective (level 3) | Highly Effective (level 4) to Exceptional (level 5) |
| * Demonstrates an understanding of the customer service needs of the position and works towards achieving them. | * Identifies additional methods for meeting customer needs and makes appropriate recommendations. |
| * Consistently speaks to customers in a friendly and informative tone. | * Provides extra effort or extra time with customers to resolve customer needs. |
|  | * Consistently serves as a resource to others in resolving particularly difficult customer service problems |