

SAINT PETER'S UNIVERSITY

Annual Development Review

This Annual Development Review is designed to link employee performance to Saint Peter's University mission and values as reflected in the Jesuit tradition and to provide guidance and consistency to the assessment process. It should be used to summarize and assess the employee's overall performance for the past year, to establish results to be achieved for specific tasks or projects for the next year, and to identify professional development goals to enable the employee to enhance performance in his/her current position or to prepare him/her for future growth.

The written performance evaluation is the final phase of the ongoing performance and assessment process. It is a formal assessment of performance over a specified period of time based on expectations identified by the supervisor and shared with the employee. It provides feedback to the employee and assists in planning for the next performance period. Informal performance assessment is the on-going feedback required for effective supervisor/employee relations. The written assessment should not replace on-going feedback and communications regarding job performance.

Performance Levels

The following performance categories or key result areas reflect a set of responsibilities and outcomes/ results expected of all professional employees. While each employee is accountable for overall performance in every category, in some instances certain criteria within a category may not be relevant to a particular position and therefore should not be considered. Likewise, additional criteria not listed here may be relevant to a particular department or position and should be added in the space provided.

Use the following rating scales to assess performance in each area and for the employee's overall performance. Add comments which support or clarify the rating assigned in the space provided.

(E) Exceptional (4)

Performance consistently far exceeds expectations due to exceptionally high quality of work performed in all *essential* areas of responsibility, resulting in an overall quality of work that was superior; and either 1) included the completion of a major goal or project, or 2) made an exceptional or unique contribution in support of unit, department, or University objectives. Although given infrequently, this rating is achievable by any employee.

(EE) Exceeds expectations (3)

Performance consistently exceeded expectations in all *essential* areas of responsibility, and the quality of work overall was excellent. Annual goals were met.

(ME) Meets expectations (2)

Performance consistently met expectations in all *essential* areas of responsibility, at times possibly exceeding expectations, and the quality of work overall was very good. The most critical annual goals were met.

(I) Improvement needed (1)

Performance did not meet expectations *consistently* – performance failed to meet expectations in one or more *essential* areas of responsibility, and/or one or more of the most critical goals were not met. A professional development plan to improve performance must be outlined in Section 4, including timelines, and monitored to measure progress.

(U) Unsatisfactory (0)

Performance was consistently below expectations in most *essential* areas of responsibility, and/or reasonable progress toward critical goals was not made. Significant improvement is needed in one or more important areas. In Section 4, a plan to correct performance, including timelines, must be outlined and monitored to measure progress.

Employee Name:
Job Title:
Department:
Assessment Period:

Section I: Core Competencies (All Employees)

The following attributes/competencies describe the manner in which the job duties are performed and are essential for all employees in achieving success in their positions. Attribute/Competency descriptions are intended as examples of desirable performance.

	4	3	2	1	0	
<u>Quality:</u> Produces work that is complete, accurate, and in an acceptable format; checks accuracy of own work; recognizes and corrects errors; requires little or no supervisory review.	E <input type="checkbox"/>	EE <input type="checkbox"/>	ME <input type="checkbox"/>	I <input type="checkbox"/>	U <input type="checkbox"/>	Comments:
<u>Productivity and Dependability:</u> Conscientious, responsible, and reliable with respect to work completion schedules and deadlines, as well as attendance; demonstrates ability to adjust to changing job requirements and/or volume of work; uses resources, including time, effectively and efficiently; learns and uses technology and equipment to improve productivity.	E <input type="checkbox"/>	EE <input type="checkbox"/>	ME <input type="checkbox"/>	I <input type="checkbox"/>	U <input type="checkbox"/>	Comments:
<u>Service Orientation:</u> Strives to be welcoming, courteous and helpful; responds to constituent requests in a timely manner; maintains composure when addressing constituent problems or concerns.	E <input type="checkbox"/>	EE <input type="checkbox"/>	ME <input type="checkbox"/>	I <input type="checkbox"/>	U <input type="checkbox"/>	Comments:
<u>Communication:</u> Openly exchanges information in a timely manner; knows who to keep informed; listens and understands; uses confidential information with discretion; writes and/or speaks in a clear, concise manner with persons at all levels of the University and other constituencies.	E <input type="checkbox"/>	EE <input type="checkbox"/>	ME <input type="checkbox"/>	I <input type="checkbox"/>	U <input type="checkbox"/>	Comments:

<u>Relationships with Other:</u> Develops and fosters professional relationships; builds rapport with others; approaches others about sensitive issues in non-threatening ways; listens to and acknowledges other ideas and concerns, even when holding a different opinion; regulates own emotions, thoughts and feelings.	E	EE	ME	I	U	Comments:
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<u>Valuing Diversity:</u> Demonstrates commitment to the University's diversity goals; deals effectively with people of all races, nationalities, cultures, abilities, ages, genders, sexual orientations, etc.; demonstrates respect for opinions and beliefs of others.	E	EE	ME	I	U	Comments:
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<u>Initiative:</u> Identifies what needs to be done and takes action; keeps current with new work methods, skills, and technologies related to job/profession; willingly accepts additional assignments; takes appropriate action in face of obstacles; takes ownership for self-development and learning.	E	EE	ME	I	U	Comments:
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<u>Problem Solving and Judgment:</u> Takes initiative to identify and resolve problems; demonstrates ability to examine problem s/issues in new ways; uses logical, systematic approaches to solve problems; reflects on past experiences to solve problems; switches strategies and tactics if the current ones are not working; weighs and evaluates information and selects appropriate alternatives.	E	EE	ME	I	U	Comments:
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<u>Integrity:</u> Demonstrates commitment to University's vision, mission and core values; participates in University service initiatives; takes action consistent with Core Values	E	EE	ME	I	U	Comments:
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

even when others don't; follows University/department policies, standards and procedures; follows through on commitments and agreements; holds self accountable for mistakes.						
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Total Points _____

Section II: Leadership Attributes/Competencies (Administrators and Professionals)

The following additional attributes/competencies are essential for supervisors and for certain other employees (depending upon position requirements) in achieving success in their positions. Attribute/Competency descriptions are intended as examples of desirable performance.

	4	3	2	1	0	
<u>Change Management:</u> Uses discernment regarding change and embraces change when it is important to do so; enrolls others in the change process; provides resources, removes barriers, and acts as an advocate for those initiating change.	E <input type="checkbox"/>	EE <input type="checkbox"/>	ME <input type="checkbox"/>	I <input type="checkbox"/>	U <input type="checkbox"/>	Comments:
<u>Goal Setting:</u> Demonstrates understanding of the University's vision, mission, values and strategic plan; helps others translate the University's vision and mission into day-to-day activities and behaviors; ensures that job goals are fully aligned with the University's goals; takes responsibility for developing, communicating, and gaining alignment on broad goals; ensures that resources, time and attention are allocated in proportion to University priorities.	E <input type="checkbox"/>	EE <input type="checkbox"/>	ME <input type="checkbox"/>	I <input type="checkbox"/>	U <input type="checkbox"/>	Comments:
<u>Influence:</u> Develops reliable networks to keep well-informed and gain support; develops and presents persuasive arguments to address the concerns, wants and needs of others; approaches others about sensitive issues in non-threatening ways; regulates own emotions, thoughts and feelings.	E <input type="checkbox"/>	EE <input type="checkbox"/>	ME <input type="checkbox"/>	I <input type="checkbox"/>	U <input type="checkbox"/>	Comments:

<u>Building Teamwork:</u> Assists the group in effectively using talents and contributions of individuals to meet department goals; provides guidance when the team is off track; champions the team within the organization; promptly recognizes and tackles morale problems.	E	EE	ME	I	U	Comments:
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<u>Performance Management:</u> Sets challenging, clear, well-defined goals; takes action to accomplish them; monitors progress and gives timely and objective performance feedback; looks for and creates situations that foster development of others.	E	EE	ME	I	U	Comments:
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<u>Empowerment:</u> Delegates responsibility to others based on their ability and potential; gives others the freedom to have control of their tasks and duties; provides guidance and support for others as they take on new challenges.	E	EE	ME	I	U	Comments:
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

Total Points _____

Section III: Key Responsibilities Specific to this Position (All Employees)

Describe how the employee performs key responsibilities as articulated in the position description. Highlight responsibilities that have been added or changed. May give an overall rating or paraphrase the essential job description.

Section IV: Overall Performance Rating (All Employees)

Consider the performance levels from the previous sections. Select a level to describe the employee's overall performance throughout the entire review period. Supervisors should use their professional judgment in considering all these factors as they arrive at the Overall Performance Rating.

E	EE	ME	I	U
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Section V: Goals and Planned Development (All Employees)

Past Year's Goals: State goals as defined in last assessment and list results achieved. If no goals were formally set, cite primary accomplishments.

Goals for Year: (Identify specific performance goals for upcoming year, as determined by supervisor and employee, and identify specific actions needed to assist employee in making progress.).

Professional Development Plan: (Identify specific professional development goals that may pertain to the employee's long term career growth or an action to enhance current job performance.)

Employee Comments:

NOTE: Signature indicates the employee has read and understands the performance assessment. It is not an indication of agreement or disagreement with the assessment.

Employee's Signature: _____ Date: _____

Supervisor's Signature: _____ Date: _____

Vice President's Signature: _____ Date: _____