



## STAFF PERFORMANCE APPRAISAL PACKET 10/11

STAFF PERFORMANCE APPRAISAL REPORT (SPAR)  
(for all Union staff, classified or appointed)

*This packet contains:*

**1. Employee Career Development Worksheet**

*Explain evaluation process, have employee complete worksheet, review and update job description if needed.*

**2. Staff Performance Appraisal Report (SPAR form)**

*In final review meeting, discuss the Staff Performance Appraisal Report with employee.*

**3. SPAR Overall Performance Appraisal Rating**

*Employee signs, makes comments as needed.*

**All Staff Performance Appraisal Reports are due June 20, 2011**

Supervisor must turn in original and one copy of SPAR and job description to payroll

*\*download this packet (Word file format or pdf file format) at:*

**[www.union.arizona.edu/intra](http://www.union.arizona.edu/intra)**

*<click on Tool Kit, then click on Staff Performance Appraisal>*



## 1. EMPLOYEE CAREER DEVELOPMENT WORKSHEET

(To be filled out by Employee)

Employee Name: \_\_\_\_\_ Employee ID#: \_\_\_\_\_

- A. Analyze the primary aspects and functions of your current job. List what you consider to be your primary job duties or assignments at this time. Then place a check mark in one of the boxes for each category to the right to indicate the degrees of challenge, accomplishment and enjoyment that each responsibility gives you.

	Amount of Challenge					Feeling of Accomplishment					Level of Enjoyment				
	Low		High			Low		High			Low		High		
	0	1	2	3	4	0	1	2	3	4	0	1	2	3	4
1.															
2.															
3.															
4.															

- B. Briefly describe the aspects of your work listed below and check the degree of satisfaction that each one affords you.

	Satisfaction Level				
	Low		High		
	0	1	2	3	4
Working Conditions:					
Relationships with Co-Workers:					
Supervision Received:					
Having Clear Responsibilities:					
Coaching, teaching, guiding and mentoring student employees:					
Job Security:					
The Kind of Work I Do (The Work Itself):					
Feeling of Personal Accomplishment:					
Opportunity for Growth:					
Compensation:					
Operating Style of Department:					
Recognition for Doing the Job:					
Other:					

- C. Below are some items that will help you to examine your job duties and how you experience them. Check the statements that you would like to address as part of your career development meeting:**

☐ I am not aware of all the job duties that are required of me.

☐ I need to better understand my job requirements and how to accomplish them.

☐ I need to identify my key strengths and problem areas on the job.

☐ How can I keep up with new developments in my field?

☐ In my present job, what new activities will enhance my skills?

☐ What new activities or skills will further my achieving my overall career goal?

- D. Describe contributions or achievements which indicate your success at improving your performance or exceeding job requirements during the past appraisal period:**

- E. Describe the goals, changes or improvements you want to make in your performance and achieve in the next appraisal period. Describe obstacles to achieving these things and suggest possible solutions:**

- F. Describe the coaching, training, or development activities that would help you pursue improved performance, job growth and/or career development:**

- G. How did you exceed your job responsibilities this past appraisal period? (please refer to the Arizona Student Unions job description)**

EMPLOYEE signature	DATE	SUPERVISOR signature	DATE

☐ (Initial) I have been given the opportunity to fill this out and choose not to do so.



## 2. STAFF PERFORMANCE APPRAISAL REPORT (SPAR)

Employee Name: \_\_\_\_\_ Employee ID#: \_\_\_\_\_

Title: \_\_\_\_\_ Dept: \_\_\_\_\_

Supervisor/Rater: \_\_\_\_\_ Rating Period from: \_\_\_\_\_ to: \_\_\_\_\_

Type of Rating: \_\_\_\_\_ 3 month probation \_\_\_\_\_ Annual  
 \_\_\_\_\_ 6 month probation \_\_\_\_\_ Mid year  
 \_\_\_\_\_ Other

### Instructions

Supporting comments are strongly suggested for all criteria. If “does not meet” or “outstanding” is warranted examples illustrating the reason must be noted in the appropriate supporting comment section.

#### Non-supervisory employees

The overall evaluation rating for non-supervisory employees is determined by the score achieved from the total number of points earned from questions 1–9. Point values are 4 = Outstanding, 3 = Exceeds, 2 = Meets, 1 = Meets Some But Not All, 0 = Does Not Meet. A maximum score of 36 is possible:

0-7= Does Not Meet  
 8-14= Meets Some But Not All  
 15-23= Meets  
 24-31 Exceeds (Plus Meets for Question 9)  
 32-36= Outstanding (Plus Meets for Question 9)

#### Supervisory employees

The overall evaluation for supervisory employees is determined by the score achieved from the total number of points earned from questions 1–10. A Maximum score of 40 is possible:

0-9= Does Not Meet  
 10-18= Meets Some But Not All  
 19-26= Meets  
 27-36= Exceeds (Plus Meets for Questions 9 and 10)  
 37-40= Outstanding (Plus Meets for Questions 9 and 10)

**1. Customer Service:** The employee is responsive to the individual needs of customers—attending, listening, promptly responding and anticipating problems or needs. Service quality by the employee is extended to customers and other employees of the department. A positive attitude is displayed when the employee is at work serving internal and/or external customers.

**Supporting Comments:**

<b>RATING:</b> _____ 4 Outstanding _____ 3 Exceeds _____ 2 Meets _____ 1 Meets Some _____ 0 Does not meet
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**2. Job Knowledge:** Employee demonstrates technical, administrative, managerial, supervisory, or other specialized knowledge necessary to perform their job. Makes an effort to learn new skills and maintain up-to-date job related information. Stays abreast of changing job techniques and concepts. Develops and refines current methods and procedures. Is open and accepting of suggested changes.

**Supporting Comments:**

**RATING:**

☐ 4 Outstanding  
☐ 3 Exceeds  
☐ 2 Meets  
☐ 1 Meets Some  
☐ 0 Does not meet

**3. Quality of Work:** Results are reliable, accurate; errors are minimal, have little impact on finished work; results have a finished, professional quality; consistently delivers what is required; meets deadlines, and follows instructions. Successfully follows through in spite of unforeseen challenges or changes. Work is accomplished in a professional manner on a consistent basis. The employee does their best; demonstrates conscientious and professional work from the perspective of colleagues, supervisors, students, and the university community; and is effective and efficient in use of human, financial, and time resources.

**Supporting Comments:**

**RATING:**

☐ 4 Outstanding  
☐ 3 Exceeds  
☐ 2 Meets  
☐ 1 Meets Some  
☐ 0 Does not meet

**4. Quantity of Work:** Accomplishes assigned work in an organized, timely manner; produces necessary results in spite of unforeseen changes in work plan; alerts appropriate team members if deadlines need to be renegotiated to accomplish work with a higher priority.

**Supporting Comments:**

**RATING:**

☐ 4 Outstanding  
☐ 3 Exceeds  
☐ 2 Meets  
☐ 1 Meets Some  
☐ 0 Does not meet

**5. Initiative and Resourcefulness:** Requires minimal supervision to accomplish assignments; independently contributes ideas and projects; see and acts upon opportunities; acts independently within established guidelines; promptly undertakes problems and devises solutions; demonstrates effective problem-solving skills—assesses, researches, plans, implements as necessary.

**Supporting Comments:**

**RATING:**

☐ 4 Outstanding  
☐ 3 Exceeds  
☐ 2 Meets  
☐ 1 Meets Some  
☐ 0 Does not meet

**6. Communication:** Oral and verbal communications are accurate, clear, responsive and respectful; results demonstrate thorough understanding of problem/purpose; usage of grammar and vocabulary are appropriate and accurate; ideas are expressed concisely, persuasively and completely; demonstrates ability to listen and pick out important information. Consistently conveys related information in a clear, timely, and understandable fashion with students, staff, faculty, and others.

**Supporting Comments:**

**RATING:**

☐ 4 Outstanding  
☐ 3 Exceeds  
☐ 2 Meets  
☐ 1 Meets Some  
☐ 0 Does not meet

**7. Teamwork & Leadership:** The extent to which the employee: develops, builds and maintains positive work relationships; demonstrates the ability to adjust to new, changing or opposing circumstances; is active in resolving workplace conflicts, and willing to undertake assigned projects. Performance demonstrates commitment to the department and a willingness to share knowledge and help others. Employee is sensitive, accepting and fosters positive working relationships in a diverse environment. Employee coaches, teaches, guides and mentors other employees where applicable.

**Supporting Comments:**

**RATING:**

- ☐ 4 Outstanding
- ☐ 3 Exceeds
- ☐ 2 Meets
- ☐ 1 Meets Some
- ☐ 0 Does not meet

**8. Planning and Organization:** The extent to which the employee effectively plans, organizes and implements tasks or programs, making use of time and facilities subject to their control. The degree to which the employee meets deadlines, maintains a clear grasp of daily tasks, and prioritizes duties in a manner consistent with organizational objectives and emergencies. Coordinates plans with others as appropriate; manages tasks or program assignments including follow-through and delegation.

**Supporting Comments:**

**RATING:**

- ☐ 4 Outstanding
- ☐ 3 Exceeds
- ☐ 2 Meets
- ☐ 1 Meets Some
- ☐ 0 Does not meet

**9. Attendance:** The extent to which the employee can be depended upon to be available for work and to fulfill position responsibilities. The employee reports to work on time, communicates schedule changes promptly to supervisor, and maintains regular attendance. Employee meets established Kronos policies for accurate time recording.

**Supporting Comments:**

**RATING:**

- ☐ 4 Outstanding
- ☐ 3 Exceeds
- ☐ 2 Meets
- ☐ 1 Meets Some
- ☐ 0 Does not meet

**10. Supervisory Responsibilities:** (Complete only for staff who supervise full-time, part-time, and/or student staff) The degree in which the supervisor delegates responsibility, maintains open communication and is sensitive to staff interaction. The supervisor provides visionary leadership and evaluates employee performance according to departmental and personal expectations. Provides effective, critical feedback that is sensitive to employee(s) and recognizes/rewards exceptional performance by employee(s). Maintains poise and empathy in diverse and stressful decision-making situations. Develops and successfully meets established budget goals. Completes all performance evaluations by deadline.

**Supporting Comments:**

**RATING:**

- ☐ 4 Outstanding
- ☐ 3 Exceeds
- ☐ 2 Meets
- ☐ 1 Meets Some
- ☐ 0 Does not meet

**Next Year's Goals:**

1. Date for next review: \_\_\_\_\_(month/year)
2. Desired changes or improvements in the employee performance in the next appraisal period:
3. Coaching, training or development activities to be pursued in the next appraisal period:



### 3. SPAR OVERALL PERFORMANCE APPRAISAL RATING

___ Outstanding	<i>Requires Associate Director's Approval</i> _____
___ Exceeds job requirements	<i>Requires Associate Director's Approval</i> _____
___ Meets job requirements	
___ Meets some but not all job requirements	<i>Requires Associate Director's Approval</i> _____
___ Does not meet job requirements	<i>Requires Associate Director's Approval</i> _____

#### **SIGNATURES**

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

Title: \_\_\_\_\_

#### **Comments by Employee**

(Additional sheets may be attached)

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

*(Employee's signature does not necessarily mean agreement with the appraisal. It merely acknowledges that the employee has had an opportunity to discuss the appraisal with the supervisor)*

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

Associate Director: \_\_\_\_\_ Date: \_\_\_\_\_

**Return the entire Evaluation Packet, one copy of evaluation, and one copy of the Job Description to:**

Student Union Memorial Center  
Payroll Office  
Room 403N