Draft APA – Norma Vazquez

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**1. ADHERENCE TO POLICIES, PROCEDURES, AND RULES:**

**Consider the employee's knowledge and understanding as related to individual's internal control responsibilities.**

**5 - Exceeds** - Has completely mastered knowledge of policies, procedures, and rules **4 - Above** - Knowledge of policies, procedures, and rules is frequently above that expected **3 - Acceptable** - Has an adequate knowledge of policies, procedures, and rules **2 - Below** - Understanding of policies, procedures, and rules is somewhat below normal expectations **1 - Does Not Meet** - Has a minimum understanding of policies, procedures, and rules

**Weight:** 10%

Selected: 3

**Comments:**

Norma continues to be a tremendous source of knowledge about the past development of policies & processes - i.e., original intent and how things might have evolved over time to get into a current state. This knowledge is often key in identifying and understanding current gaps, and how to begin addressing them. Norma can sometimes get frustrated when (cooperative/consensus-driven) new process/procedure development takes longer than expected.

**2. ATTITUDE:**

**Consider the employee's manner, disposition or orientation exhibited in daily efforts.**

**5 - Exceeds** - Has a positive and encouraging attitude and makes a positive contribution to morale **4 - Above** - Shows pride in work **3 - Acceptable** - Maintains a good attitude the majority of the time, though improvement could be made **2 - Below** - Lacks a positive attitude towards work environment **1 - Does Not Meet** - Often argumentative; considered unreceptive and antagonistic

**Weight:** 9%

Selected: 4

**Comments:**

Norma takes a great deal of pride in her work. Not only does she want to positively represent the group, department, division, and university with her work, but she also is driven to ensure that the work done by the Service Desk, Client Services, and [IT@Sam](mailto:IT@Sam) positively represents her. These are both highly commendable motivations. Her positive attitude about the Service Desk, its staff, and the work we do reveals itself in how she cares about each individual, both personally and professionally. This has a positive impact on overall morale.

**3. EXTERNAL COMMUNICATION:**

**Consider how employee responds and interacts with employees and others within SHSU or groups outside of SHSU.**

**5 - Exceeds** - Builds rapport with a variety of people; develops alliances to work together toward common goals **4 - Above** - Effectively handles difficult external relations **3 - Acceptable** - Adapts self to others and to most situations; seeks guidance when needed **2 - Below** - Sometimes rigid and defensive with outside departments **1 - Does Not Meet** - Lacks understanding of external departments; fails to consider their impact on other departments

**Weight:** 9%

Selected: 4

**Comments:**

Norma has cultivated many working relationships all around campus, which she is able to utilize in the pursuit of high quality, client centric, support services. She also cares deeply about doing things for the benefit of the client experience and for the right reasons. This motivation guides her and helps her work well with clients of all types, even when things get difficult.

**4. INITIATIVE:**

**Consider employee’s ingenuity for completing extra or self-initiated projects or assignments, adaptability to change, and employee’s initiative in completing assignments ahead of schedule.**

**5 - Exceeds** - Develops new ideas and methods to improve quality of results **4 - Above** - Seeks additional knowledge pertaining to job **3 - Acceptable** - Follows formal instructions as necessary **2 - Below** - Shows little interest in current practices relating to job **1 - Does Not Meet** - Unwilling to demonstrate interest in gaining new knowledge

**Weight:** 9%

Selected: 4

**Comments:**

Norma likes to learn and is always willing to pursue new knowledge, whether it be expanded knowledge about a current technology, or learning about something new in order to help begin the process of evaluating it for potential future use at the university.

**5. INTERPERSONAL RELATIONS:**

**Consider whether employee works harmoniously and effectively with fellow employees, management and students.**

**5 - Exceeds** - Goes out of way to promote good interpersonal relations; very cooperative **4 - Above** - Effectively handles difficult interpersonal relations **3 - Acceptable** - Adapts self to others and to most situations; seeks guidance when needed **2 - Below** - Sometimes rigid and defensive; does not foster good working environment **1 - Does Not Meet** - Fails to consider others; not courteous; lacks understanding

**Weight:** 9%

Selected: 2

**Comments:**

Norma can be a pleasure to work with. At times, however, generally when she gets frustrated with the pace of a process, a decision is made that she disagrees with, or the owner/steward of something doesn't share her sense of urgency, Norma does not react in a constructive manner. The frustration manifests itself in a focus on an immediate need for a policy and/or a question/placement of blame about why testing/documentation wasn't done/produced (in the moment, determining the best way to provide support is needed, not a post-mortem). A byproduct of this can also be a relentless focus on either badgering the owner/steward to do their work/updates (and how/what to do), or to make a push to just do it ourselves because the clients need it & the SD has to know what to do/tell them. This directive tone and mindset has, over time, led to many reports of discomfort with communication from (and a desire to avoid working with) Norma.

**6. JOB KNOWLEDGE:**

**Consider employee’s knowledge of duties, responsibilities of position, and how the employee applies technical knowledge, education, and experience to job requirements.**

**5 - Exceeds** - Has completely mastered job; strives to learn more/improve job skills **4 - Above** - Understands all phases of work; most job duties mastered **3 - Acceptable** - Has adequate grasp of job requirements; is able to learn new aspects of job **2 - Below** - Lacks knowledge of some phases of work **1 - Does Not Meet** - Unable to complete job duties; poor understanding of job

**Weight:** 9%

Selected: 4

**Comments:**

Norma knows most all of her job duties and how they should be done. She quite effectively brings her skills, knowledge, and experience to bear in understanding the proper daily operation of, and continual efforts to improve, the Service Desk.

**7. ORGANIZATION AND USE OF TIME:**

**Consider employee’s ability to organize and prioritize their work and how effectively time is used.**

**5 - Exceeds** - Extremely capable in coordinating tasks in changing situations **4 - Above** - Plans skillfully; handles unusual situations well **3 - Acceptable** - Completes assignments within time expected; meets schedules **2 - Below** - Difficulty in determining priority and schedule of duties **1 - Does Not Meet** - Ineffective in routine tasks; cannot prioritize or schedule

**Weight:** 9%

Selected: 4

**Comments:**

Norma is disciplined and professional in her prioritization and time management skills. I can count on her to make good decisions as well as to ask for direction/advice when she needs it.

**8. QUALITY OF WORK:**

**5 - Exceeds** - Requires minimum supervision; consistently thorough and accurate **4 - Above** - Requires little supervision; is exact and precise most of the time; seldom makes errors **3 - Acceptable** - Usually accurate; makes minimal errors **2 - Below** - Makes above average number of errors; final product often needs revision or correction **1 - Does Not Meet** - Makes frequent and recurrent errors

**Weight:** 9%

Selected: 4

**Comments:**

Norma does very good work. Rarely have I had to go back and make corrections because of inaccuracies or careless mistakes. I can count on her to produce high quality work product.

**9. QUANTITY OF WORK:**

**Consider assignments completed, overall productivity, and amount of work done during the workday.**

**5 - Exceeds** - Produces consistently high volume of work; extremely productive and fast **4 - Above** - Volume of work frequently above that which is expected **3 - Acceptable** - Volume of work is limited to tasks assigned **2 - Below** - Volume of work is generally below what is expected; does just enough to get by **1 - Does Not Meet** - Minimum requirements not met; volume of work generally unsatisfactory

**Weight:** 9%

Selected: 4

**Comments:**

Norma's work output is strong. She produces a lot (e.g., QA reviews of student tickets and call recordings, knowledge articles, etc.) and can be counted on to get more challenging tasks like the initial Local Admin Users Account audit coordinated and completed.

**10. RESPONSIBILITY AND DEPENDABILITY:**

**Consider the employee’s willingness to take on assignments and be held accountable.**

**5 - Exceeds** - Requires minimum supervision; seeks additional responsibility; is very reliable **4 - Above** - Reliable; requires little supervision; carries through effectively **3 - Acceptable** - Usually takes care of necessary tasks and completes them with reasonable promptness **2 - Below** - Frequently requires prompting; often fails to meet deadlines **1 - Does Not Meet** - Unreliable; requires close supervision; does not accept responsibility

**Weight:** 9%

Selected: 4

**Comments:**

Generally speaking, Norma is very responsible and dependable - I can count on her. She is willing to take on assignments & accountability. An area I would like to see her focus on in the upcoming year is moving past the baggage of the past, particularly regarding internalizing (and acting from) our "Culture of Accountability" vs. the "Culture of Blame" that seems to have informed much past experience.

**11. USE OF REQUIRED TECHNOLOGY:**

**Consider how employee utilizes the resources provided by SHSU Information Technology Services.**

**5 - Exceeds** - Has mastery level knowledge of required technology and as new ideas or technologies are introduced, is able to learn and use them swiftly and appropriately **4 - Above** - Has substantial knowledge of required technology **3 - Acceptable** - Possesses skills and knowledge to perform their job competently **2 - Below** - Needs to expand knowledge of basic technology **1 - Does Not Meet** - Lacks basic knowledge of technology

**Weight:** 9%

Selected: 4

**Comments:**

Norma's experience with, and knowledge of, our shared technology resources is a tremendous asset. As with the history of policies and processes, Norma has a long history with the technology standards that we've used and continue to use. This brings daily benefit to the Service Desk.

**12. PROFESSIONAL DEVELOPMENT REQUIREMENT:**

**Has the employee met the professional development training requirement? (8 hours for staff or 12 hours for managers). A response is required.**

**Comments:**

Norma has met this requirement.

**13. PERFORMANCE STRENGTHS:**

**Please highlight the employee's performance strengths in the section provided. Provide short, bullet-style comments for discussion during the employee conference.**

**Comments:**

Experience & Organizational Knowledge Commitment & Passion Process & Policy Oriented Client Centric

**14. AREAS FOR IMPROVEMENT:**

**Please highlight the employee's areas for improvement in the section provided. Provide short, bullet-style comments for discussion during the employee conference.**

**Comments:**

Leadership - work on not being afraid to step up/out with ideas to offer/present them for discussion (disagreement, debate, and consensus are good) Change Management (not ITIL) - develop skill set to move beyond just offering/making suggestions for improvements, to offering a plan for developing, implementing, and getting buy-in for the change Communication Style - develop a style that is viewed/received/perceived as less directive and more open/collaborative Knowledge Management - continue development work on current knowledge base, and pursue the larger KCM migration proposal discussion