



Staff Goals Based Performance Evaluation

Employee Name _____	Position Title _____
Start Date _____	College/Division _____
Review Date _____	Manager Name _____

Performance & Development is a cyclical process. This form has been developed to help managers and employees continuously evaluate performance throughout the year. Click “Jump To” underneath each section of the timeline to be brought to the corresponding section of the form. You can save your progress and return to the form throughout the year. If you have any questions about the Performance & Development process, please contact your [HR Business Partner](#).

Performance & Development Timeline:



While the visual gives you an overall sense of what happens when, it’s important to review performance and solicit/provide feedback regularly throughout the year.

As always, check with your local division/ college for any internal deadlines.

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Setting Goals:

Complete this section before or at the start of the fiscal year (**typically July/ August**). Establish 3-5 goals. Describe the goal and its relation to the university mission and any divisional/ college goals. Be sure to outline how each goal will be measured and its achievement verified. Include expected outcomes, quality measures, dates, timelines and/or descriptive narrative. A minimum of one (1) goal should reflect plans for personal growth and development. **See our course on Performance & Development for additional resources**

GOALS (July/August)

Goal:

Measurement(s)/Metric(s):

Goal:

Measurement(s)/Metric(s):

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Goal:

Measurement(s)/Metric(s):

Goal:

Measurement(s)/Metric(s):

Goal:

Measurement(s)/Metric(s):

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Mid-Year Review:

Complete this section midway through the performance and development process (**typically, December/January**). Review progress toward goals, key job responsibilities, and skills and competencies, and performance to date. Document the discussion here and if goals or priorities change, revise accordingly. Be sure to capture the date it occurred. **See our course on Performance & Development for additional resources**

MID-YEAR CHECK-IN (December/January)

Mid-Year Review
Date _____

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Year-End Accomplishments:

This section is used to evaluate performance over the past year. Accomplishments and performance are measured in three areas: achievement of goals; effective use of skills and competencies; and performance overall.

Outline results achieved and include any comments, feedback and examples of good performance, significant achievements, skills applied or in need of improvement here. Managers assign ratings for each goal, the job performance, and the individual skills using the metrics and job expectations identified and discussed at the start of the cycle or the project. **See our course on Performance & Development for additional resources**

ACHIEVEMENT RELATED TO GOALS (March/April)

Goal:		
Measurement(s)/Metric(s):		
Results:		
<table border="1"><tr><td>Rating</td><td></td></tr></table>	Rating	
Rating		

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Goal:	
Measurement(s)/Metric(s):	
Results:	
Rating	

Goal:	
Measurement(s)/Metric(s):	
Results:	
Rating	

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Goal:		
Measurement(s)/Metric(s):		
Results:		
Rating		

Goal:		
Measurement(s)/Metric(s):		
Results:		
Rating		

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KEY JOB RESPONSIBILITIES

Rating		

SKILLS AND COMPETENCIES

Competency	Definition	Ratings
Values and Integrity	Upholds the utmost standards of integrity and ethics; conducts themselves in compliance with legal/regulatory requirements and university policies.	
Embracing Diversity of Thought	Values and leverages different perspectives; is willing to change one's mind.	
Adaptability/Flexibility	Adaptable and flexible in responding to changing priorities.	
Effective Communications: Up, Down & Across	Takes ownership and plays an active role in communications - up, down, and across the organization; effectively communicates with different groups and constituencies.	
Decision Making & Problem Solving	Makes effective and timely decisions; solves problems incorporating multiple perspectives; thinks about over-arching considerations when making decisions.	
Delivering Results	Gets work done in a quality manner; focuses on outcomes; does what it takes to achieve goals and objectives; measures progress; uses resources effectively.	
Focus on the Customer	Has a service orientation and mindset of customer service; provides high quality-service to customers in their area; seeks input of customers; adapts to meet their needs.	
Initiative	Identifies ways to improve work processes and procedures; makes suggestions and, where appropriate, takes action to make the changes happen.	
Professional/Technical Knowledge	Develops and maintains expertise within own area, function or field of study and gains the trust and respect of colleagues.	
Teamwork & Collaboration	Works effectively in a team environment to get work done to reach the best possible solutions; focuses on the objectives and results at the team level; works well with a wide range of people.	

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LEADERSHIP SKILLS AND COMPETENCIES (for supervisors of staff only, click above to enable)		
Competency	Definition	Ratings
Developing People (Self & Others)	Constantly improves, grows and develops self and others to reach higher and broader levels; always preparing the next generation of leaders; actively maintains an accurate assessment of self and others including strengths and weaknesses.	
Managing Resources Effectively	Manages staff and resources effectively; delegates appropriately; aligns and distributes work efficiently to achieve goals.	
Leading Innovation & Change	Inspires and leads others to innovate and make change happen; develops and articulates a vision for the organization – vividly describes the destination; works to move things forward to reach the next level.	
University Wide Perspective	Takes action and leads based on a big picture understanding; thinks strategically and knows how their part connects to the whole and how the whole impacts their part; uses the overall University vision and mission to guide action in own area.	

Overall Performance Rating (See <u>Performance Rating Definitions</u>)	
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Development Discussion	

Manager Comments	

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Employee Comments	

SIGNATURES*	
Employee's Signature and Date:	
Manager's Signature and Date:	
Next Level Manager's Signature and Date:	

Access instructions for e-signatures using Adobe Sign [HERE](#).

*Employee's signature implies neither agreement nor disagreement with this evaluation. The signature indicates only that the employee has read this evaluation and discussed it with the manager.