

Planning and Evaluation Form

Unit Mission Statement:

How this position supports the Unit Mission:

Standards/Goals/Objectives Associated with Success in This Position

“Standards/Goals/Objectives” are specific statements or requirements and agreed upon by the supervisor and the employee. “Measurement Method” reflects the evaluation basis for the expected results. “Results achieved” are the accomplishments of the employee during the evaluation period.

1	Standard/Goal/Objective:	Results Achieved:
	Measurement Method:	<input type="checkbox"/> Level 3 <input type="checkbox"/> Level 2 <input type="checkbox"/> Level 1

Comments:

2	Standard/Goal/Objective:	Results Achieved:
	Measurement Method:	<input type="checkbox"/> Level 3 <input type="checkbox"/> Level 2 <input type="checkbox"/> Level 1

Comments:

3	Standard/Goal/Objective:	Results Achieved:
	Measurement Method:	<input type="checkbox"/> Level 3 <input type="checkbox"/> Level 2 <input type="checkbox"/> Level 1

Comments:

4	Standard/Goal/Objective:	Results Achieved:
	Measurement Method:	<input type="checkbox"/> Level 3 <input type="checkbox"/> Level 2 <input type="checkbox"/> Level 1

Comments:

5	Standard/Goal/Objective:	Results Achieved:
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	Measurement Method:	<input type="checkbox"/> Level 3
		<input type="checkbox"/> Level 2
		<input type="checkbox"/> Level 1

Comments:

6	Standard/Goal/Objective:	Results Achieved:
	Measurement Method:	<input type="checkbox"/> Level 3
		<input type="checkbox"/> Level 2
		<input type="checkbox"/> Level 1

Comments:

7	Standard/Goal/Objective:	Results Achieved:
	Measurement Method:	<input type="checkbox"/> Level 3
		<input type="checkbox"/> Level 2
		<input type="checkbox"/> Level 1

Comments:

Appendix C – Example Planning and Evaluation Forms (Continued)

Core Competencies

____ **Job Knowledge/Potential:** Possesses knowledge of established policies and procedures. Possesses sufficient skills and knowledge to perform all parts of the job effectively and efficiently. Provides technical assistance to others and is consulted by others on technical matters. Pursues professional development. Displays innovation.

Level 1 ☐ Level 2 ☐ Level 3 ☐

Comments:

____ **Accountability:** Accepts responsibility for actions. Meets changing conditions and situations in work responsibilities. Accepts constructive criticism and suggestions and makes appropriate changes. Handles conflict in a constructive manner. Seeks solutions acceptable to all. Willingness to accept supervision. Can consistently be relied on to perform in a professional manner. Seldom needs to be reminded. Is fully ready to work at beginning of work schedule and continues until workday is done. Does not abuse leave practices.

Level 1 ☐ Level 2 ☐ Level 3 ☐

Comments:

____ **Interpersonal Relations:** Maintains smooth working relations, support and respect of others. Demonstrates tact and diplomacy in negotiations or confrontations with others. Contributes to employee morale and motivation. Is accessible to others and responsive to their questions, needs and concerns. Supports and appreciates the diversity of co-workers, students, customers, and visitors. Shares information, credit and opportunities. Displays an appropriate balance between personal effort and team effort and ability to establish rapport with internal and external customers.

Level 1 ☐ Level 2 ☐ Level 3 ☐

Comments:

____ **Communication/Verbal and Written:** Uses appropriate language and terminology. Communicates in a manner that is understood, courteous and effective. Demonstrates effective listening skills. Seeks and considers ideas from others on issues. Keeps supervisor, co-workers and internal units informed. Is considerate of the communication styles of others. Prepares written communications/documents that are complete, clear and understandable.

Level 1 ☐ Level 2 ☐ Level 3 ☐

Comments:

____ **Customer Service:** 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 insure satisfaction. Considers/recommends alternatives to customers when needed.

Level 1 ☐ Level 2 ☐ Level 3 ☐

Comments:

All supervisors must have the following core competency in their performance plan:

____ **Supervision/ Performance Management:** Employees supervised demonstrate productivity, competence and high morale. Provides supervision, feedback and training for employees. Utilizes employee's skills and abilities. Conducts performance Planning and evaluations for employees in a timely manner. Develops goals, objectives and deadlines and communicates them to employees. Resolves routine personnel issues or problems.

Level 1 ☐ Level 2 ☐ Level 3 ☐

Comments:

Appendix C – Example Planning and Evaluation Forms (Continued)

The following are examples of additional competencies that may be appropriate for specific situations. They are provided here only as examples and are not meant to limit the inclusion of competencies beyond those mandated by the State.

_____ **Motivation/Commitment:** Displays drive and energy in accomplishing tasks. Handles several responsibilities concurrently. Conveys positive and professional image of work unit to others. Puts forth-extra effort when needed. Agrees to modify schedule or adapt Programs when necessary. Self-starter. Displays positive attitude in work assignments and interactions with others.

Level 1 ☐ Level 2 ☐ Level 3 ☐

Comments:

_____ **Competence/Responsibility:** Maintains quality/quantity standards. Accepts responsibility for all areas of job. Uses time effectively with minimal errors. Completes work thoroughly in a reasonable amount of time. Meets or surpasses established goals. Works accurately, neatly, and attends to detail.

Level 1 ☐ Level 2 ☐ Level 3 ☐

Comments:

_____ **Problem Solving/Reasoning:** Recognizes and analyzes work related problems. Uses available resources to evaluate and recommend potential solutions. Ability to use good judgment to arrive at sound conclusions. Ability to take timely action.

Level 1 ☐ Level 2 ☐ Level 3 ☐

Comments:

_____ **Safety:** Aware of job safety procedures. Keeps abreast of changes in safety procedures. Practices safety work habits. Reports possible safety hazards to supervisor. Attends safety-training programs, as appropriate.

Level 1 ☐ Level 2 ☐ Level 3 ☐

Comments:

_____ **IT Security and Controls:** Possesses knowledge of and adheres to University and departmental IT Security policies and procedures, including storage, access, handling and confidentiality; ensures security control effectiveness (i.e., controls implemented correctly, operating as intended, meeting security requirements for information system); determines risk to organizational operations and assets, individuals, other organizations, and the University; applies security settings appropriately.

Level 1 ☐ Level 2 ☐ Level 3 ☐

Comments:

_____ **Additional Competency 1:**

Level 1 ☐ Level 2 ☐ Level 3 ☐

Comments:

_____ **Additional Competency 2:**

Level 1 ☐ Level 2 ☐ Level 3 ☐

Comments:

Appendix C – Example Planning and Evaluation Forms (Continued)

Development Programs

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Narrative Section

(For use by Supervisor to amplify the evaluation or Employee to explain disagreement with the evaluation; attach additional pages if necessary).
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