

**PERFORMANCE ACCOUNTABILITY ASSESSMENT
AND
CONFERENCE FORM**

EMPLOYEE	FUNCTIONAL TITLE	PAYROLL TITLE
MANAGER/SUPERVISOR	ASSESSMENT PERIOD	CONFERENCE DATE
DEPARTMENT	DIVISION	

TOTAL PERFORMANCE ASSESSMENT RATING LEVELS

Instructions: Select one of the performance levels to describe the staff member's overall performance during the assessment period. Provide explanation and/or specific examples to support the level selected.

SATISFACTORY

A) Accomplished - Top Performer/Role Model: Uniquely contributed to Department, or Division or University goals; Recognized as a strong and valued contributor.

OR

B) Proficient - Met/Exceeded Expectations/Standards: Successfully performed critical job responsibilities; Annual goals were achieved.

UNSATISFACTORY

C) Developing - Needs Improvement: Met some but not all expectations and significant performance improvement is needed in specific areas and/or job responsibilities indicated.

OR

D) Unacceptable - Fails to Achieve Expectations/Standards - Unsuccessful in performing critical job responsibilities and does not fulfill position requirements.

For an unsatisfactory total performance rating, a performance improvement plan must be developed and monitored, or termination must be initiated.

SECTION 1: POSITION SUMMARY

Describe the primary function of the position. Use the job description as a reference.

SECTION 2: ACHIEVEMENT OF GOALS/POSITION RESPONSIBILITIES

For the current assessment period or fiscal year.

Instructions: List below, in order of importance, 3 to 5 key goals, accountabilities or job responsibilities that were established for this assessment period. These items may include new performance goals, accountabilities, special projects, job/career development activities, or maintenance of regular duties. Consider to what extent results were achieved and what factors contributed to their success or not meeting their goals and responsibilities, and how might they overcome them.
(Use additional sheets if necessary.)

Key Goals and Accountabilities (Identify and describe core job responsibilities and performance criteria)	Results Achieved (Describe and quantify with specific supporting examples how each goal, accountability or responsibility was achieved)

SECTION 3: COMPETENCIES FOR SUCCESS: APPRAISAL AND DEVELOPMENT

The following key competencies (or skills) are essential for all staff in achieving success in their positions. Depending upon position requirements, other job-specific skills may be required of a staff member. The extent to which the staff member demonstrates these skills or needs to strengthen them should be reviewed as part of the performance dialogue, staff development, and/or performance improvement discussions.

Instructions: Select and comment on the performance level demonstrated by the staff member during the review period for the following skill areas: *(Additional sheets may be used if necessary.)*

<p align="center">COMPETENCIES FOR SUCCESS AND DEVELOPMENT</p> <p align="center">(Describe how the employee demonstrated each competency)</p>	<p align="center">Accomplished - Top Performer/Role Model</p>	<p align="center">Proficient - Met/ Exceeded Standards</p>	<p align="center">Developing - Needs Improvement</p>	<p align="center">Unacceptable - Fails to Achieve Standards</p>	<p align="center">PLANNED SKILL DEVELOPMENT</p> <p align="center">(Describe how the employee can further develop the competency)</p>
<p>1) Leadership:</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<ul style="list-style-type: none"> - Creates and articulates a shared organizational vision that provides a sense of mission and rationale for others - Serves as an innovative agent for meaningful change - Acts/and plans strategically - Addresses difficult issues - Creates and implements future visions by influencing goals, values and systems - Creates a sense of purpose - Is persuasive and enthusiastic 	<p>COMMENTS:</p>				<p>COMMENTS:</p>
<p>2) Management:</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<ul style="list-style-type: none"> - Committed to the mission and goals of the University - Elicits participation, accountability, teamwork and staff commitment in accomplishing goals and objectives - Identifies and meets targets and objectives within agreed time frames and budgets - Coordinates work efforts, sets deadlines, and reviews progress - Defines standards for performance and evaluates against it - Prioritizes and delegates duties and responsibilities - Empowers staff through delegation, motivation and provision of needed resources - Develops short and long term goals - Designs and implements specific processes for change 	<p>COMMENTS:</p>				<p>COMMENTS:</p>
<p>3) Inclusiveness/Diversity:</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<ul style="list-style-type: none"> - Shows respect for differences in backgrounds, lifestyles, viewpoints, and needs, with regard to ethnicity, gender, creed, and sexual orientation - Promotes a trusting and welcoming environment for all - Works to understand the perspectives brought by all - Pursues knowledge of diversity and inclusiveness 	<p>COMMENTS:</p>				<p>COMMENTS:</p>

<p align="center">COMPETENCIES FOR SUCCESS AND DEVELOPMENT</p> <p align="center">(Describe how the employee demonstrated each competency)</p>	<p align="center">Accomplished - Top Performer/Role Model</p>	<p align="center">Proficient - Met/ Exceeded Standards</p>	<p align="center">Developing - Needs Improvement</p>	<p align="center">Unacceptable - Fails to Achieve Standards</p>	<p align="center">PLANNED SKILL DEVELOPMENT</p> <p align="center">(Describe how the employee can further develop the competency)</p>
<p>4) Job and/or Specialized Knowledge:</p> <ul style="list-style-type: none"> - Demonstrates the knowledge and skills required to perform the job, including administrative policies and procedures, technical and/or specialized knowledge/expertise and managerial/supervisory skills - Understands position goals, responsibilities, and expectations - Is current on professional/technical developments related to position 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<p align="center">COMMENTS:</p>
<p>5) Partnership/Collaboration/Teamwork</p> <ul style="list-style-type: none"> - Builds partnerships by identifying opportunities and taking action to build strategic relationships between one's area and other departments, units, vendors or organizations to help achieve business goals and solve problems - Demonstrates sensitivity to the needs of others - Offers assistance, support, and feedback to others - Works effectively and cooperatively with others 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<p align="center">COMMENTS:</p>
<p>6) Professionalism:</p> <ul style="list-style-type: none"> - Demonstrates knowledge of and commitment to the practices of the field - Practices high standards of behavior within an occupation - Exercises, respects and maintains appropriate confidentiality in all aspects of work - Demonstrates accountability in all work responsibilities and to consequences of own actions - Demonstrates high standards and values in all work situations - Exercises sound and ethical judgment when acting on behalf of the University - Models integrity and confidence in dealing with challenging situations or people - Provides staff with opportunities for professional training and growth 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<p align="center">COMMENTS:</p>
<p>7) Communication:</p> <ul style="list-style-type: none"> - Demonstrates the ability to express thoughts clearly, both verbally and in writing - Demonstrates effective listening skills - Shares knowledge and information - Asks questions and offers input for positive results 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<p align="center">COMMENTS:</p>

SECTION 4: TOTAL PERFORMANCE ASSESSMENT

Instructions: Consider the staff member's overall performance from Sections 2 and 3. Select an assessment rating level to describe the total performance throughout the entire assessment period.

TOTAL PERFORMANCE ASSESSMENT RATING LEVEL:

Satisfactory:

Accomplished - Top
Performer/Role Model

Satisfactory:

Proficient - Met/Exceeded
Expectations/Standards

Unsatisfactory:

Developing - Needs
Improvement

Unsatisfactory:

Unacceptable - Fails to
Achieve Expectations/
Standards

COMMENTS:

SECTION 5: GOALS AND PROFESSIONAL DEVELOPMENT PLANS

For the next/upcoming assessment period or fiscal year.

Instructions: List 3 to 5 performance goals or key job responsibilities for the upcoming performance period. These goals may be related to new responsibilities/projects, improvement of ongoing responsibilities, and professional development. Note staff member's activities and projected completion dates.

Key Goals and Accountabilities (Clearly define key accountabilities, goals or objectives, including on-going work duties and developmental goals, aligned with department)	Targets and Action Plans (Describe expected results, how performance outcomes will be measured/evaluated, and time frame for successful completion)

SECTION 6: SIGNATURES

I have discussed this performance accountability assessment document with the employee.

Immediate Manager or Evaluator: _____ **Date:** _____

Reviewer Signature: _____ **Date:** _____

I met and discussed this assessment with my manager. My signature indicates that I have read and received a copy of the conference form, which will be placed in my personnel file, but does not necessarily imply my agreement. I understand that I may submit comments, either attached to this document or separately.

Staff Member: _____ **Date:** _____

SECTION 7: STAFF MEMBER'S COMMENTS

(Use additional sheets if necessary.)

Staff Member: _____

Date: _____