**University of San Diego 2021-2022 Performance Evaluation**

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Employee Name:** | | |  | | | | **Oracle ID#:** | |  |
| **Position Title:** | |  | | | | | | | |
| **Department:** |  | | | | **Supervisor Name:** | |  | | |
| **Period of Review***(From/To)***:** | | | |  | | **Date of Review:** | |  | |

This performance evaluation tool is designed to help facilitate conversation between supervisor and employee regarding the employee’s work performance over the past year. **See last page for Performance Factor Rating Definitions.**

**Section 1: Performance Factors**

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| --- | --- | --- | --- | --- | --- | --- |
| **5**  ***Extraordinary***  ***Achievement*** | **4**  ***High***  ***Achievement*** | **3**  ***Expected***  ***Performance*** | **2**  ***Fair & Developing***  ***Performance*** | **1**  ***Unsatisfactory Performance*** | **Employee Rating** | **Supervisor Rating** |
| **Mission & Core Values**: Demonstrates commitment to the University’s Mission Statement and its core values of Academic Excellence, Knowledge, Community, Ethical Conduct, and Compassionate Service when performing duties. Committed to the University’s Culture of Care by treating everyone with courtesy and compassion so that they feel valued, cared for, and respected. | | | | |  |  |
| **Inclusiveness**: Demonstrates commitment to diversity and inclusion. Welcomes others, engages in opportunities to experience diversity on campus, encourages the expression of different points of view, and seeks to understand the perspective of others. | | | | |  |  |
| **Position Expertise**: In alignment with the job description, effectively applies technical/managerial/ professional skills and knowledge to the job. | | | | |  |  |
| **Work Habits**: Demonstrates dependability, accountability, and appropriate time management on projects and with attendance. Successfully prioritizes, plans, and organizes. Takes initiative; is creative, flexible, and/or focuses on process improvement. | | | | |  |  |
| **Quality of Work**: Completes job assignments accurately and efficiently. Demonstrates responsiveness and good judgment. | | | | |  |  |
| **Resource Management**: Adheres to university’s budget constraints and demonstrates fiscal awareness. Uses work time for maximum productivity, cares for and maintains university’s assets, looks to increase operational efficiencies, offers creative solutions when new resource needs arise, and is not wasteful with university supplies and discretionary resources. | | | | |  |  |
| **Problem Solving**: Identifies areas of concern, applies strategic thinking, provides relevant information, and tactfully shares appropriate action. | | | | |  |  |
| **Communication Skills**: Verbal and written communication skills are clear, concise, organized and respectful. Is an attentive listener. | | | | |  |  |
| **Collaboration & Teamwork**: Effectively responds to and works with others, including interactions with co-workers, supervisors(s), faculty, students and/or the community. Presents a positive image to university and non-university constituents. | | | | |  |  |

**Performance Factors for Management and Supervision**

**(Complete if applicable for the position otherwise N/A.)**

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| **5**  ***Extraordinary***  ***Achievement*** | **4**  ***High***  ***Achievement*** | **3**  ***Expected***  ***Performance*** | **2**  ***Fair & Developing***  ***Performance*** | **1**  ***Unsatisfactory Performance*** | **Employee Rating** | **Supervisor Rating** |
| **Management**: Develops short and long-term goals in support of department, division, and campus objectives. Leads by example, encourages institutional effectiveness and takes action to ensure the efficient stewardship of university resources (operational, financial, and human). Appropriately delegates tasks and projects (if applicable). | | | | |  |  |
| **Supervision**: Provides thoughtful oversight, direction, motivation, and recognition. Clearly articulates expectations and offers constructive feedback and coaching. Formulates pathways for growth and development. Addresses performance concerns in a timely manner. | | | | |  |  |
| ***For Budget Managers:*** *Provides timely review of financial performance for operating areas, including identification and resolution of adjustments needed. Adheres to institutional timelines regarding position maintenance, budget forecasting, necessary budget appropriations, and loading of annual budget in to Hyperion. Administer purchasing and accounts payable protocols.* | | | | |  |  |

**Performance Factors Specific to Division – University Advancement**

**(Operating within the dictates of each department, supports the division’s current year goals.)**

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| **5**  ***Extraordinary***  ***Achievement*** | **4**  ***High***  ***Achievement*** | **3**  ***Expected***  ***Performance*** | **2**  ***Fair & Developing***  ***Performance*** | **1**  ***Unsatisfactory Performance*** | **Employee Rating** | **Supervisor Rating** |
| **University Advancement:** Raises the profile of USD, regionally, nationally, and internationally.  Increases the breadth and depth of engagement with the university by its various constituencies (students, faculty/staff, parents, alumni, donors, and other friends). Helps strengthen and secure the financial vitality of the institution and fosters the mission of the university. | | | | |  |  |

**Comments Related to Performance Factors and Ratings**

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| Employee Comments: |
| Supervisor Comments: |

**Section 2: 2020-2021 Goals**

**(List the goals from the previous year and evaluate the results.)**

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Goal: | | | | | | | Performance Expectations & Measures: | | |
| Employee Comments: | | | | | | | | | |
| Supervisor Comments: | | | | | | | | | |
|  | Fully Met |  | Partially Met |  | Not Met | |  |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Goal: | | | | | | | Performance Expectations & Measures: | |
| Employee Comments: | | | | | | | | |
| Supervisor Comments: | | | | | | | | |
|  | Fully Met |  | Partially Met |  | Not Met | |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Goal: | | | | | | | Performance Expectations & Measures: | |
| Employee Comments: | | | | | | | | |
| Supervisor Comments: | | | | | | | | |
|  | Fully Met |  | Partially Met |  | Not Met | |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Goal: | | | | | | | Performance Expectations & Measures: | |
| Employee Comments: | | | | | | | | |
| Supervisor Comments: | | | | | | | | |
|  | Fully Met |  | Partially Met |  | Not Met | |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Goal: | | | | | | | Performance Expectations & Measures: | |
| Employee Comments: | | | | | | | | |
| Supervisor Comments: | | | | | | | | |
|  | Fully Met |  | Partially Met |  | Not Met | |

**Section 3: Summary of Overall Performance**

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| Supervisor Comments: |

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| --- | --- | --- | --- | --- | --- |
| **Training**: Completed ***all*** required training (e.g. FERPA, Title IX, Workplace Harassment Prevention, other position- | | | | | |
| specific training). |  | Yes |  | No |  |

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| **Job Description**: Based on your discussion, does the job description need to be updated? |  | Yes |  | No |

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| Is a Performance Improvement Plan needed to help support the employee in meeting expectations in the coming year? | | | | | |
|  | Yes |  |  | No |  |

Supervisor’s Name *(Please Print)*:

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Next Level Manager’s Name *(Please Print)*:

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| Employee Comments: |

Employee’s Name *(Please Print)*:

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*(Signature confirms these evaluation documents have been reviewed and discussed with the employee. It does not indicate agreement or disagreement.)*

**Section 4: 2022-23 Goals**

(List in priority three to five major goals/objectives for the next year and how they will be measured and assessed.)

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| --- | --- |
| Goal: | Performance Expectations & Measures: |
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| Goal: | Performance Expectations & Measures: |

**Professional Development Plans**

(List development initiatives to be accomplished throughout the next year. These should enhance the skills

or competencies of the individual and/or help them accomplish the goals established above.)

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**Performance Factor Rating Definitions**

*(Not necessary to print/include with the completed form.)*

Employees and supervisors are asked to assess performance for different categories using the following performance rubric. Employees who are demonstrating strong performance on a consistent basis should rate **3** for *Expected Performance*. Ratings higher than **3** indicate performance exceeding position expectations. Ratings below **3** indicate performance that is developing, inconsistent or not meeting expectations. It is reasonable that any employee’s scores would vary depending on the category and their work deliverables from the past year.

**5.** *Extraordinary Achievement* = Work that is characterized by sustained exemplary accomplishments at the highest level throughout the rating period; providing exemplary support to the contributions of the organization. Performance consistently exceeds and sometimes far exceeds the performance goals of the job. Typically demonstrates full mastery of knowledge, skills, and abilities for the required work. Demonstrates leadership and positively influences others to demonstrate a positive attitude toward learning. Actively seeks out new skills and projects. Takes initiative to improve systems, processes, or in developing new ways to enhance the work of the university.

**4.** *High Achievement* = Work that is characterized by a consistently high level of accomplishment; meeting and often exceeding the performance goals of the job. Typically independently demonstrates fully proficient knowledge, skills, and abilities for the required work. Regularly and consistently demonstrates positive attitude toward learning and improvements. Consistently develops new skills and practices them. Consistently seeks challenges and takes initiative for projects and/or improvements as well.

**3.** *Expected Performance* = Work that is characterized by achieving results at a level that generally meets and sometimes exceeds the performance goals of the job. Typically demonstrates fully proficient knowledge, skills, and abilities for the required work. Demonstrates a positive attitude toward learning and improvements. Independently practices new skills. Consistently seeks challenges and new opportunities for learning.

**2.** *Fair & Developing Performance* = Work that requires further development and/or improvement to fully meet the performance goals in one or more areas. Contributes to the organization but performance, knowledge, skills, abilities, and/or attitude is generally below expected levels for fully proficient. May demonstrate a positive attitude toward learning and improvement but not on a consistent basis. May seek challenges and new opportunities but not on a consistent basis. A score of this level could be appropriate if the individual is still developing their skills or if the individual has the ability but does not apply it consistently.

**1.** *Unsatisfactory Performance* = Work that fails to meet the goals of the job function; generally falls short of performance goals (even though sometimes approaching goals); provides minimal support to the contributions of the organization. Rarely seeks challenges and new opportunities for learning or improvements.