

Business Operations Performance Feedback & Evaluation



Worksheet

REVISED
11:47 am, 4/27/05

Name: _____
Date of current review _____

Rating	
1	Consistently fails to meet agreed upon goals & expectations
2	Sometimes meets agreed-upon goals & expectations
3	Meets agreed-upon goals & expectation
4	Meets and often exceeds agreed-upon goals & expectations
5	Consistently exceeds agreed-upon goals & expectations

Service Focus

Key Word: Customer	Rating	Descriptor	Rating (1-5)
	1.	Works to ensure that the organization is "easy (for the customers) to work with."	
	2.	Effectively deals with customer problems; communicates accurate information to customers.	
	3.	Takes personal responsibility for commitments made to customers.	
	4.	Continually seeks to understand the needs of the customer.	
	5.	Establishes and maintains effective customer relationships.	
	6.	Develops measures to assess customer satisfaction and monitor results.	
	7.	Takes action when service falls below acceptable standards.	
	8.	Solicits feedback and incorporates accurate customer perspective in decision-making.	
	9.	Responds promptly to customer requests.	
	10.	Other	
	11.	Other	
	12.	Other	
			Total of Rating Column
		Core Competency Rating (total divided by # of descriptors rated)	

Quality of Work

Key Words: Results, Job Knowledge, Attendance	Rating	Descriptor	Rating (1-5)
	1.	Focuses on the desired result of the work group.	
	2.	Produces complete and accurate work.	
	3.	Accomplishes agreed-upon goals.	
	4.	Submits assignments in a timely manner.	
	5.	Works within available guidelines and approaches, and knows when alternatives must be considered.	
	6.	Accepts responsibility for her/his own actions and decisions.	
	7.	Organizes work to achieve maximum productivity and effectiveness.	
	8.	Prioritizes tasks appropriately.	
	9.	Requests help when needed.	
	10.	Balances multiple projects.	
	11.	Keeps informed on current University and departmental policies and procedures.	
	12.	Makes adjustments to improve performance.	
	13.	Performs job duties with little guidance.	
	14.	Is punctual and maintains all time commitments.	
	15.	Meets attendance standards in accordance with departmental guidelines.	
	16.	Plans in advance for scheduled absences.	
	17.	Demonstrates ability to apply new information to enhance effectiveness of the job.	
	18.	Understands goals of unit.	
	19.	Follows through on requests.	
	20.	Meets deadlines.	
	21.	Learns quickly and grasps purpose of task.	
	22.	Understands what the University expects of herself/himself.	
	23.	Adheres to department/University guidelines, e.g. safety procedures.	
	24.	Other	
	25.	Other	
	26.	Other	
		Total of Rating Column	
		Core Competency Rating (total divided by # of descriptors rated)	

Initiative and Development

Key Words: Learning, Innovation, Flexibility, Creativity	Rating	Descriptor	Rating (1-5)
	1.	Takes independent action to change the direction of events.	
	2.	Proposes new approaches, methods or technologies.	
	3.	Develops better, faster, cheaper ways of doing things.	
	4.	Identifies what needs to be done and takes action before the situation requires it.	
	5.	Actively works toward resolving small problems/challenges before they magnify.	
	6.	Understands strengths and weaknesses and actively works to improve self.	
	7.	Encourages and fosters creativity in peers and co-workers.	
	8.	Seeks self-development and assumes greater responsibility.	
	9.	Supports organizational change.	
	10.	Shows a willingness to learn aspects of different jobs (cross-training).	
	11.	Accepts new challenges and approaches to work.	
	12.	Offers creative and innovative ideas and solutions.	
	13.	Independently handles changes and new problems.	
	14.	Uses up-to-date technical/professional principles.	
	15.	Adapts to change in job responsibilities.	
	16.	Learns new skills on own initiative.	
	17.	Acts as resource person for co-workers.	
	18.	Open and flexible to new ideas.	
	19.	Other	
	20.	Other	
		Total of Rating Column	
		Core Competency Rating (total divided by # of descriptors rated)	

Respect and Community

Key Words: Teamwork, Integrity, Relationships, Diversity, Outreach		Descriptor	Rating (1-5)
	1.	Displays high ethical standards (honesty, loyalty, respect) in communication and behavior.	
	2.	Participates in University outreach programs and initiatives (Operation Feed, Community Charitable Drive, etc.)	
	3.	Participates in departmental activities.	
	4.	Values and respects others' knowledge, skills, experience and contributions.	
	5.	Projects a positive attitude, looking for solutions rather than problems.	
	6.	Develops, maintains and strengthens partnerships (inside or outside the organization) with those who can provide information, assistance and support.	
	7.	Demonstrates concern that one be perceived as responsible, reliable and trustworthy.	
	8.	Establishes and maintains cooperative working relationships.	
	9.	Praises others on their strengths and contributions.	
	10.	Promotes collaboration and a sense of harmony and community in teams.	
	11.	Communicates diplomatically with others.	
	12.	Handles conflicts and disagreements constructively.	
	13.	Acts affirmatively to enhance diversity and create a climate of inclusion and acceptance.	
	14.	Builds morale and team spirit.	
	15.	Gains respect and confidence of others.	
	16.	Works comfortably with people of all backgrounds.	
	17.	Is able to remain balanced and professional in challenging situations.	
	18.	Establishes personal credibility.	
	19.	Treats all with respect and dignity.	
	20.	Other	
	21.	Other	
	22.	Other	
	Total of Rating Column		
Core Competency Rating (total divided by # of descriptors rated)			

Information Management

Key Words: Communication, Information, Decision-Making		Descriptor	Rating (1-5)
	1.	Identifies the information needed to clarify a situation.	
	2.	Keeps others informed.	
	3.	Knows when to document actions or conversations.	
	4.	Knows what decisions or problems need to be escalated to others for resolution.	
	5.	Demonstrates good listening skills.	
	6.	Makes decisions based on facts.	
	7.	Establishes measures to verify assumptions.	
	8.	Gets more complete and accurate information by checking multiple sources.	
	9.	Solicits feedback to ensure a common understanding.	
	10.	Produces clear and concise written communication.	
	11.	Identifies, clarifies and communicates pertinent information.	
	12.	Maintains open lines of communication up and down the channels.	
	13.	Presents ideas in an organized, clear and concise manner.	
	14.	Proposes a course of action or makes a recommendation in a timely manner.	
	15.	Employs tact and discretion.	
	16.	Offers appropriate feedback.	
	17.	Articulates ideas clearly.	
	18.	Demonstrates a sense of priority, knowing what must be done now and what can wait until later.	
	19.	Maintains organized files.	
	20.	Refrains from jumping to conclusions based on no or minimal information.	
	21.	Identifies what situations require what type of communication (e-mail, phone, face-to-face).	
	22.	Other	
	23.	Other	
24.	Other		
Total of Rating Column			
Core Competency Rating (total divided by # of descriptors rated)			

**Business Operations Performance Feedback & Evaluation
Worksheet (continued)**

Leadership

		Descriptor	Rating (1-5)	
Key Words: Performance Management, Planning/Goals, Change Management, Fiscal Management, Project Management	Strategic Planning			
	1.	Considers market/industry trends and existing/potential customers.		
	2.	Tackles problems in a logical, systematic, sequential approach.		
	3.	Develops and communicates goals in support of the organization's mission.		
	4.	Considers long-term impact of actions and decisions. Takes necessary risks when outcomes cannot be guaranteed.		
	5.	Proactively seeks and works with small, emerging, disadvantaged and minority (SEDM) businesses.		
	6.	Other		
	7.	Other		
			Subtotal Rating Column (1-7)	
			Subtotal Strategic Planning Rating (total divided by # of descriptors rated)	
	Performance Management			
	8.	Delegates responsibilities and works effectively.		
	9.	Holds staff accountable.		
	10.	Identifies the competencies required by each employee.		
	11.	Sets clear performance expectations.		
	12.	Provides direction to achieve desired goals.		
	13.	Revisits performance expectations throughout the year to assess progress, redirect efforts, or re-prioritize as needed.		
	14.	Provides employees with feedback in a constructive and respectful manner.		
	15.	Uses coaching skills to improve employee performance.		
	16.	Takes responsibility for employees' performance (by setting goals, tracking progress, ensuring feedback and addressing performance problems).		
	17.	Recognizes employees for contributions (formal and informal).		
	18.	Generates enthusiasm and commitment for ideas, proposals, projects and solutions.		
	19.	Leads by example; serves as role model for employees.		
	20.	Encourages and fosters creativity in employees.		
	21.	Accessible and approachable to employees and co-workers.		
	22.	Creates opportunities for employees to participate in training initiatives.		
	23.	Conducts effective and timely performance reviews.		
	24.	Makes hiring decisions on the basis of equal opportunity and objective job criteria.		
	25.	Addresses employee safety concerns including appropriate training.		
	26.	Follows appropriate corrective action procedures.		
	27.	Other		
	28.	Other		
			Subtotal Rating Column (8-28)	
			Subtotal Performance Management Rating (total divided by # of descriptors rated)	
	Change Management			
29.	Builds acceptance and commitment to change.			
30.	Focuses on the positive aspects of change.			
31.	Copes with ambiguity associated with new ideas or approaches.			
32.	Adapts to shifting priorities by adjusting work plans.			
33.	Acts as a change agent.			
34.	Other			
35.	Other			
		Subtotal Rating Column (29-35)		
		Subtotal Change Management Rating (total divided by # of descriptors rated)		

Leadership

	Descriptor		Rating (1-5)
	Key Words: Performance Management, Planning/Goals, Change Management, Fiscal Management, Project Management	Fiscal Management	
36.		Establishes and maintains sound financial management practices and controls.	
37.		Develops budgets that recognize short-term requirements and long-term goals.	
38.		Understands and utilizes current financial planning models (forecasts).	
39.		Identifies and adapts to changing circumstances to fall within budget parameters.	
40.		Builds contingencies to address unanticipated events and reduce financial risk to the University.	
41.		Other	
42.		Other	
		Subtotal Rating Column (36-42)	
		Subtotal Fiscal Management Rating (total divided by # of descriptors rated)	
Project Management (for long-term projects)			
43.		Develops realistic and achievable project plans.	
44.		Anticipates the implications and consequences of situations and takes appropriate actions to prepare for possible contingencies.	
45.		Provides ongoing direction and support throughout the project life cycle.	
46.		Monitors progress against plan on a regular basis; identifies potential cost/time overruns so additional resources or timeline extensions can be secured.	
47.		Manages the expectations of stakeholders to ensure buy-in of actual deliverables.	
48.		Tests deliverables to increase chances of success at project completion.	
49.		Other	
50.		Other	
		Subtotal Rating Column (43-50)	
		Subtotal Project Management Rating (total divided by # of descriptors rated)	
		Total of Rating Column (1-50)	
		Core Competency Rating (total divided by # of descriptors rated)	

Business Operations

Performance Feedback & Evaluation

Section 1: Employee Information

Name: _____
 Department: _____
 Title: _____
 Type of Review Probationary Annual
 Other _____ Self
 Date of last review: _____
 Date of current review _____

Section 2: Goals Progress (from previous year; list goals and status)

Section 3: Employee Performance on Core Competencies

Use the following ratings to evaluate performance in each area:

- | | | | | |
|---|--|--|--|---|
| 1 | 2 | 3 | 4 | 5 |
| Consistently fails to meet agreed-upon goals & expectations | Sometimes meets agreed-upon goals & expectations | Meets agreed-upon goals & expectations | Meets and often exceeds agreed-upon goals & expectations | Consistently exceeds agreed-upon goals & expectations |

Service Focus Definition: Focuses efforts on meeting and exceeding the needs of students, faculty and staff; develops positive working relationships with internal and external customers.	Check one rating for Service Focus: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <i>If performance is rated "1" or "2", indicate improvement action plan below.</i>	Prior Year Rating
--	--	--------------------------

Describe the employee's performance in this area, using specific examples:

Initiative and Development Definition: Committed to self-improvement; manages change in positive ways; takes initiative to improve job knowledge.	Check one rating for Initiative & Development: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <i>If performance is rated "1" or "2", indicate improvement action plan below.</i>	Prior Year Rating
---	---	--------------------------

Describe the employee's performance in this area, using specific examples:

Quality of Work Definition: Produces complete and accurate work in a timely manner; achieves agreed-upon goals.	Check one rating for Quality of Work <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <i>If performance is rated "1" or "2", indicate improvement action plan below.</i>	Prior Year Rating
---	---	--------------------------

Describe the employee's performance in this area, using specific examples:

Business Operations—Performance Feedback & Evaluation (continued)

Section 3: Employee Performance on Core Competencies (*continued*)

Use the following ratings to evaluate performance in each area:

1	2	3	4	5
Consistently fails to meet agreed-upon goals & expectations	Sometimes meets agreed-upon goals & expectations	Meets agreed-upon goals & expectations	Meets and often exceeds agreed-upon goals & expectations	Consistently exceeds agreed-upon goals & expectations

Respect and Community Definition: Conducts business with honor and integrity; works cooperatively with others; supports partnerships inside and outside of the University.	Check one rating for Respect & Community: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <i>If performance is rated "1" or "2", indicate improvement action plan below.</i>	Prior Year Rating
--	---	-------------------

Describe the employee's performance in this area, using specific examples:

Information Management Definition: Manages information in order to make fact-based decisions in a timely manner.	Check one rating for Information Management: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <i>If performance is rated "1" or "2", indicate improvement action plan below.</i>	Prior Year Rating
--	--	-------------------

Describe the employee's performance in this area, using specific examples:

Leadership (for supervisors only) Definition: Effectively manages people and/or projects; instills trust, provides direction and delegates responsibility; gives coaching and feedback; leads by example; identifies and follows-through on training and career development needs.	Check one rating for Leadership: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <i>If performance is rated "1" or "2", indicate improvement action plan below.</i>	Prior Year Rating
--	--	-------------------

Describe the employee's performance in this area, using specific examples:

Section 4: Overall Rating

Scale	Rating	Criteria
1	Consistently fails to meet core competencies	2 or more ratings below 3
2	Does not meet all core competencies	1 rating below 3
3	Meets core competencies	All ratings of at least 3
4	Meets and often exceeds core competencies	All ratings of at least 3 and 2 or more ratings above 3
5	Consistently exceeds core competencies	All ratings of at least 4 and 3 or more ratings of 5

Current Year Overall Rating	
Prior Year Overall Rating	

Section 5: New Goals (mandatory)

Please be as specific as possible.

Section 6: Signatures & Processing

Employee's Signature		Date	
Supervisor's Signature		Date	

Signing this form indicates only that the form has been reviewed with you and that you have received a copy. It does not imply agreement.