



NOTE: be sure to use the verbaige, "failed to meet expectaions" if indeed someone failed to meet your expectations

Performance Roles - Job Knowledge/Career Role

Needs Improvement	Meets Expectations	Exceeds Expectations	Outstanding
Midpoint			
<ul style="list-style-type: none"> ● Needs to learn much more to perform job satisfactorily ● Needs to ask for help on many projects ● Rarely meets responsibilities ● Makes more errors than average ● Unwilling or hesitant to obtain additional training ● Does not check accuracy of work before submitting ● Has made errors that have resulted in negative consequences 	<ul style="list-style-type: none"> ● Job knowledge appropriate to manage tasks and responsibilities ● Understands X and Y very well ● Knows most of the systems necessary to succeed ● Keeps up-to-date on job knowledge through required reading and training ● Keeps up-to-date on job knowledge through required reading and training 	<ul style="list-style-type: none"> ● Understands all aspects of the job ● Willingly shares knowledge of departmental processes ● Strong level of job knowledge ● Actively seeks new knowledge and skills to consistently perform beyond expectations 	<ul style="list-style-type: none"> ● Has complete mastery of the job ● Has a great wealth of knowledge about all facets of the job ● Has extensive knowledge of the overall system; is able to view the big picture, make connections, and recommend improvements based on that broad knowledge ● Is a great resources for others inside and outside the department/division ● Has maintained all required certifications and/or new training to stay abreast of changes in job

Performance Roles - Team Role

Needs Improvement	Meets Expectations	Exceeds Expectations	Outstanding
Midpoint			
<ul style="list-style-type: none"> ● Not seen as a team player ● Is hesitant to collaborate with others ● Occasionally works against team goals ● Fails to contribute to work of teams ● Makes excuses for not getting assignments done ● Reassigned from ____ team(s) this year 	<ul style="list-style-type: none"> ● Serves as an effective team member ● Is willing to collaborate with others when asked ● Communicates well with other teams ● Typically an optimistic team player ● Dedicated to team goals ● Heads ____ teams and serves on ____ teams 	<ul style="list-style-type: none"> ● Works well on all teams ● Seeks opportunities to collaborate with others when appropriate ● Is able to articulate the value of a project to the overall team ● Performs team-assigned work on time ● Quality of work exceeds expectations ● Keeps others informed and engaged within the team ● Creates strong teams 	<ul style="list-style-type: none"> ● Displays consistent and exceptional teamwork ● Seeks opportunities to lead teams toward a common goal ● Has the ability to articulate team goals, track progress toward those goals, and inspire team members to contribute ● Can lead effective and concise meetings ● Drives others to exceed their goals ● Works within and between teams knowledgably and capably ● Manages the team process with great skill ● Serves as the head of ____ teams on- and off-campus

Performance Roles - Innovator/Initiative Role

Needs Improvement	Meets Expectations	Exceeds Expectations	Outstanding
Midpoint			
<ul style="list-style-type: none"> ● Does what is asked and no more ● Rarely takes action unless prompted to do so ● Doesn't make decisions without approval, when none is required ● Shows initiative below a level required ● Complains about the system rather than making substantial suggestions for improvement 	<ul style="list-style-type: none"> ● Takes initiative when appropriate ● Makes decisions and solve problems without seeking permission ● Comfortable in working independently and reliably ● Willingly makes adaptations to existing processes when improvements can be made 	<ul style="list-style-type: none"> ● Frequently takes initiative ● Often displays foresight and troubleshoots problems ● Is above the norm in displaying initiative ● Shows initiative to solve a problem, save funds, and/or change processes ● Looks for ways to build upon existing processes and makes recommendations for improvements 	<ul style="list-style-type: none"> ● Always open to and seeking out new and innovative ideas ● Saved the university monies or created revenue enhancing strategies ● Knows when and how to create and implement programs and strategies ● Developed a new process to improve procedures ● Solves problems quickly and effectively ● Works across departments, divisions, colleges, and off campus ● Maintains a vision of the big picture while considering details and possibilities

Performance Roles - Communication Role

Needs Improvement	Meets Expectations	Exceeds Expectations	Outstanding
Midpoint			
<ul style="list-style-type: none"> ● Uncomfortable in responding to questions ● Makes occasional mistakes when speaking ● Is not confident when presenting ● Position often not clearly stated verbally or in written materials ● Takes too long to get to the point ● Written communication often leads to requests for clarification ● Is unable to articulate opinions and feelings, letting concerns grow without being addressed 	<ul style="list-style-type: none"> ● Explains material effectively ● Rarely provides inaccurate information ● Knows where to find answers independently of asking for direction ● Is a competent presenter ● Is competent in creating written documents with few errors ● Edits documents before sending to ensure: tone, grammar/punctuation, and accuracy of content ● Articulates concerns to immediate supervisor 	<ul style="list-style-type: none"> ● Is confident when speaking ● Prepares for all important communications ● Is articulate and brief ● Answers questions in a professional manner with great customer service ● Is patient in repeating answers to frequent questions ● Writes quickly, clearly, and correctly without editing required ● Uses tools to create error free, readable, and informative documents ● Resolves concerns with appropriate communication skills 	<ul style="list-style-type: none"> ● Superior verbal communication skills in person, via phone, in meetings, and while giving presentations ● Thoughtful in engaging employees at all levels ● Articulate spokesperson for the team's views and goals ● All writing is clear, concise, error-free and persuasive ● Responds in a timely manner to all requests for information ● Resolves concerns by leveraging exceptional communication skills

Performance Roles - University Leadership Role

Needs Improvement	Meets Expectations	Exceeds Expectations	Outstanding
Midpoint			
<ul style="list-style-type: none"> ● Is not secure in leading a team ● Rarely assists to solve problems or volunteer ● Frequently needs to ask others for direction ● Cannot delegate ● Rarely involves staff in decision making ● Changes roles and assignments without notice and communication ● Fails to understand that great leaders engage the team on all levels ● Is critical of leadership without showing interest in getting involved or providing solutions 	<ul style="list-style-type: none"> ● Effectively motivates and directs ● Displays strengths in leading and motivating others ● Encourages others at all levels of the organization ● Shows an interest in taking on leadership roles ● Provides input when asked 	<ul style="list-style-type: none"> ● Has the confidence of employees and peers ● Organizes effective teams ● Headed _____ teams/projects ● Dedicates time and follow-up necessary to achieve goals ● Sets an example for others ● Considers employee personal and professional growth ● Willingly leads when asked 	<ul style="list-style-type: none"> ● Leads with facilitating the success of the department and division ● Helps employees achieve professional and organizational goals ● Motivates employees to engage, contribute, and grow ● Builds excellent teams based on talents and capabilities ● Leads _____ teams on- and off-campus by volunteering or being appointed ● Implemented key programming in the area of _____ ● Seeks for opportunities to lead; frequently reaches out to colleagues to pull together to solve issues

These Matricies were adapted from the following resources:

Max, D. & Bacal R. 2011. Perfect Phrases for Performance Reviews. Madison, WI: McGraw-Hill Companies.

Leadership IQ. 2014. Part 2 of 4-part series "What Great Managers Do Differently" *Taking the Pain Out of Performance Reviews*.

Produced by:

Staff Development & Assessment Committee