

# WESTERN OREGON UNIVERSITY

## Unclassified Professional Staff Performance Appraisal

NAME: \_\_\_\_\_ V# \_\_\_\_\_ POSITION: \_\_\_\_\_

EVALUATOR: \_\_\_\_\_ REVIEW PERIOD: \_\_\_\_\_

This form is to be used in preparation of performance appraisals for unclassified professional employees. Comments should be made about each of the general categories listed. The list of suggested indicators attached serves as examples of the kind of measurements, which can be used to assess that aspect of performance. The numerical ratings given are intended to reflect the supervisor's overall assessment of performance in a category. The ratings are also intended to be reflective of the accomplishment of goals and objectives during the appraisal period.

**Performance Factors** (Circle appropriate number for each factor)

Rating: (5) Outstanding; (4) Exceeds Requirements; (3) Satisfactory; (2) Needs Improvement; (1) Unsatisfactory

**Position Knowledge**            5    4    3    2    1

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Professionalism**            5    4    3    2    1

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Program Management/Problem Solving & Organizational Skills**    5    4    3    2    1

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Human Resource Management & Team Interaction**            5    4    3    2    1

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Communication**            5    4    3    2    1

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Financial Management & Control**                      5    4    3    2    1

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Service to the University**                      5    4    3    2    1

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Professional Development & Continuing Growth**                      5    4    3    2    1

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**General Comments**

\_\_\_\_\_  
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\_\_\_\_\_

\_\_\_\_\_  
Supervisor Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Employee Signature  
(Signature does not imply agreement)

\_\_\_\_\_  
Date

## **EXAMPLES OF PERFORMANCE INDICATORS FOR EACH CATAGORY**

### **Position Knowledge**

- Possesses general and specialized knowledge expected for the position
- Is sufficiently well informed and educated to perform at the level expected for the position
- Understands relation of tasks to unit goals and University's mission
- Keeps current on trends and remains knowledgeable in their professional field
- Is knowledgeable of legal mandates and policies pertinent to the position
- Anticipates program needs
- Analyzes issues thoroughly

### **Professionalism**

- Actively supports the goals and mission of both their unit and the University
- Demonstrates commitment and concern for the institution, students, and colleagues
- Participates in committee and other leadership roles, on and off campus
- Willing to accept new tasks and assignments
- Encourages creativity in others
- Willing to take risks
- Copes with stress of change in a reasonable and effective manner
- Copes effectively with undesirable situations
- Exhibits self-direction and initiative
- Resolves issues and questions appropriately
- Develops and/or contributes to new programs or program improvements
- Maintains standards of professional ethics
- Exhibits interest and enthusiasm toward work

### **Program Management/Problem Solving & Organizational Skills**

- Produces quality work in appropriate quantity
- Plans and organizes work appropriately
- Establishes meaningful priorities
- Appropriately delegates tasks to others
- Meets critical deadlines and adapts to changes in deadlines
- Keeps supervisor appropriately informed
- Implements effective courses of action
- Uses program/department evaluation results to improve operations
- Clearly identifies the goals and objectives of the program and evaluates progress
- Efficiently collects, analyzes, and processes accurate and reliable data
- Expresses program evaluation results clearly and concisely
- Provides program evaluation results to others as required
- Organizes, plans, and forecasts work skillfully to meet position needs
- Analyzes problems skillfully
- Uses logic and good judgment to reach solutions

### **Human Resource Management & Team Interaction**

- Prepares timely and thorough performance appraisals for staff
- Contributes effectively to group actions
- Is personally responsible, steadfast and can be called upon to meet challenges
- Assists in determining the needs of the work place; helps to meet goals
- Coordinates own work with others, seeks opinions, values working relationships
- Is regularly attentive to safety and health regulations
- Maintains a professional and cooperative attitude with colleagues
- Applies effective supervisory skills
- Functions within collective bargaining agreements with employee organizations
- Prevents or settles grievances at lowest level without setting an improper precedent
- Utilizes knowledge of Affirmative Action Plan, Equal Opportunity Act and Title IX regulations
- Establishes rapport with students and strives to develop positive relations
- Works effectively with students to promote growth and maturation
- Exhibits understanding of the social, emotional, and physical problems that some students face
- Works cooperatively with faculty, staff, and students
- Provides support and guidance to students and staff

- Functions effectively with members of different ethnic groups and individuals with disabilities
- Actively works to resolve interpersonal conflicts
- Maintains a healthy and productive work environment for staff
- Models effective human relations skills
- Effectively deals with information of a sensitive or confidential nature
- Develops and maintains appropriate working relationships with outside entities
- Provides leadership for staff and students
- Promotes independence for students and staff members
- Makes careful retention decisions about employees
- Is responsive to employee requests for additional training, when appropriate
- Makes performance appraisal a joint project with employees
- Complies with University policies and procedures in areas governing employee relations, i.e. sexual and racial harassment

### **Communication**

- Communicates knowledge clearly, accurately and thoroughly
- Listens attentively and responds thoughtfully
- Organizes and expresses thoughts clearly and concisely orally and in writing
- Maintains appropriate records and is punctual in submitting forms, reports, etc.
- Uses appropriate communications channels
- Keeps supervisor informed about actual or potentially sensitive issues
- Maintains appropriate/effective communication with supervisor and subordinates
- Exhibits ability to communicate on different levels and in different situations (with students, faculty, staff, in a committee meeting, a workshop or classroom)
- Asks questions when unclear about assignments or projects
- Makes clear oral presentations
- Gives clear, concise instructions/directions
- Prepares written materials which are accurate and understandable

### **Financial Management & Control**

- Manages budget within established guidelines
- Plans in advance for efficient use of resources
- Uses accurate and reliable data and information
- Applies Federal, State, and University budget and general accounting procedures relevant to position area
- Trains staff on appropriate budget and fiscal matters
- Projects and quantifies future needs accurately
- Submits budget and financial documents on time
- Uses an effective system for monitoring expenses and staying within budget
- Ensures that budget adjustments are well documented and justifiable
- Promptly reports any anticipated budgetary problems to the appropriate person
- Makes wise use of resources

### **Service to the University**

- Regularly seeks to provide quality service to achieve customer satisfaction
- Serves on committees
- Participates in university governance
- Gets involved in campus or community activities
- Volunteers to serve campus or community

### **Professional Development & Continuing Growth**

- Takes advantage of professional growth opportunities
- Seeks new knowledge, applies it to the position and shares it with others
- Remains competent and knowledgeable in their professional field
- Has developed and met educational goals
- Has received honors or awards
- Participates in professional organizations