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|  | 9 Walters Avenue, Unit 5075Storrs, CT 06029-5075Telephone: (860) 486-3034Fax: (860) 486-3160 |

 **Management/Confidential Performance Management Form
Calendar Year 2020**

**PLEASE NOTE: This form works best if you CLICK to go to each field vs. using the “tab” key. Also, when typing in a sentence or paragraph, the field will adjust itself accordingly.**

**Employee Information**

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| --- | --- |
| **Employee Name (Last, First):** Click here to enter text.  | **Employee #:** Click here to enter text. |
| **Department:** Click here to enter text. | **Title:** Click here to enter text. |
| **Performance Period:** Click here to enter text. | **Manager Name:** Click here to enter text. |

**Exceptional:** Employees in this category are proactive, keenly focused on what matters, and passionate to succeed. They demonstrate exemplary conduct for other staff to emulate; they serve as role models. They significantly exceed goals for the year as well as role expectations and requirements. They stand out above other staff.

**Exceeds Expectations:** Employees in this category consistently exceed job requirements, standards, and expectations.

**Meets/Proficient:** Employees in this category are performing satisfactorily, consistently meet and at times exceed standards, are fully competent in all the job’s required skills and tools and exhibit a solid foundational knowledge and understanding of the job’s required policies and procedures.

**Needs Improvement/Development:** Employees in this category are not fully achieving their work duties; improvement is expected over the next 6 to 12 months.

**Unsatisfactory:** Employees in this category must complete a Performance Improvement Plan. This plan is developed to improve or correct poor performance, containing timelines that are outlined and monitored to measure the employee’s progress.

**PERFORMANCE FACTORS**

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| --- | --- | --- |
| **Job Knowledge and Competency** | **Manager Rating** | **Employee Rating** |
| * Demonstrates an understanding of concepts, methods, techniques and principles necessary to accomplish job duties.
* Demonstrates technical skills required for the position. Understands business needs and desired outcomes.
* Possesses and continually updates requisite knowledge and understanding of assigned duties, responsibilities, policies, procedures and compliance requirements to perform the position.
* Creates effective work plans; identifies resources and processes; and sets and meets priorities.
* Takes responsibility for and maintains quality results.
* Holds self and others accountable; follows through, does not blame others.
 | Select the appropriate rating from the following drop down.Choose an item. | Select the appropriate rating from the following drop down.Choose an item. |
| **Employee Comments:** Click or tap here to enter text. |
| **Manager Comments:**Click or tap here to enter text. |
|  |
| **Leadership** | **Manager Rating** | **Employee Rating** |
| * Demonstrates knowledge of the University's mission and values and their relationship to the department's work.
* Exhibits integrity and professionalism; possesses great capacity to lead; takes charge, gains support and commitment.
* Shows bias for action; anticipates future; makes it happen; tolerates change; is adaptable; accepts responsibility for results.
* If applicable, manages employee performance by recognizing and rewarding exceptional performance and takes action to improve poor performance.
 | Select the appropriate rating from the following drop down.Choose an item. | Select the appropriate rating from the following drop down.Choose an item. |
| **Employee Comments:**Click or tap here to enter text. |
| **Manager Comments:**Click or tap here to enter text. |
|  |
| **Commitment to Civility and Diversity** | **Manager Rating** | **Employee Rating** |
| * Respects, values, promotes a diverse work environment, where all are treated with dignity and respect regardless of race, gender, ethnicity, socioeconomic status, nationality, religion, ability, sexual orientation, gender identity, and gender expression.
* Exhibits understanding that Diversity is about differences; Civility is about making every difference count.
* Addresses the difference between disagreement and informed debate vs demeaning, harassment, or bullying, threatening or violent behavior, either in verbal or written form that affects the ability to learn, teach, or work in the University community.
* Creates a welcoming environment with productive and positive workplace relationships
* Builds and supports a diverse and inclusive community by demonstrating respect in the workplace. Identifies opportunities to increase awareness and hold self and others accountable for acting in a way which breaks down barriers between groups of difference.
 | Select the appropriate rating from the following drop down.Choose an item. | Select the appropriate rating from the following drop down.Choose an item. |
| **Employee Comments:**Click or tap here to enter text. |
| **Manager Comments:**Click or tap here to enter text. |
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| **Communication** | **Manager Rating** | **Employee Rating** |
| * Is strategic, innovative, and articulate; presents clear expectations; keeps people informed.
* Expresses self well in verbal and written communication; keeps others informed; is open, honest, and flexible.
* Is sensitive to differences in communication styles based on cultural or other factors and responds appropriately.
* Shares information as needed and in ways that promote collaboration; does not over commit and under deliver.
* Communicates effectively and respectfully verbally and in writing; follows instructions and shares information appropriately; engages in meaningful two-way conversations; listens attentively and clarifies information when necessary.
* Knows audience, adapts accordingly, listens actively before responding or deciding; accepts and offers feedback constructively.
 | Select the appropriate rating from the following drop down.Choose an item. | Select the appropriate rating from the following drop down.Choose an item. |
| **Employee Comments:**Click or tap here to enter text. |
| **Manager Comments:**Click or tap here to enter text. |
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| **Relationship Building and Teamwork** | **Manager Rating** | **Employee Rating** |
| * Fosters positive working relationships in a diverse workplace, respect for one's fellow workers, and cooperation with others.
* Works in a positive, supportive and respectful manner with students, staff, faculty, other departments and the public.
* Demonstrates courage of convictions; sees clearly through developing problems; shares responsibility and accountability.
* Values a fair playing field for everyone; contributes to the achievement of joint objectives; is collaborative, approachable.
* Maintains positive attitude; holds self/others accountable; brings others along; shares 'spotlight' for all; is loyal to others.
 | Select the appropriate rating from the following drop down.Choose an item. | Select the appropriate rating from the following drop down.Choose an item. |
| **Employee Comments:**Click or tap here to enter text. |
| **Manager Comments:**Click or tap here to enter text. |
|  |
| **Customer Service/Customer Satisfaction** | **Manager Rating** | **Employee Rating** |
| * Exerts genuine effort to quickly establish trust and confidence with all stakeholders to provide needed support, especially during crisis.
* Receives and provides appropriate feedback, handles the unexpected, maintains calm, and is ready to assist all customers, and staff including the most difficult.
* Goes above and beyond to seek and establish effective and efficient methods to deliver service and satisfaction.
* Gets high praise by peers, managers, and other stakeholders for customer service.
* Is a positive, civil, and respectful member of the team, assisting in every way possible without showing impatience, rudeness, or bias.
 | Select the appropriate rating from the following drop down.Choose an item. | Select the appropriate rating from the following drop down.Choose an item. |
| **Employee Comments:**Click or tap here to enter text. |
| **Manager Comments:**Click or tap here to enter text. |

**Overall Performance Rating: Manager**Select the overall rating that best reflects combined performance and results.

Choose an item.

**Overall Performance Rating: Employee**Select the overall rating that best reflects combined performance and results.

Choose an item.

**Signatures**

Employee should sign following receipt from Manager. Employee’s signature acknowledges receipt of the completed evaluation. It does not indicate agreement with the contents. The employee may include their own comments to refute or amplify content in their performance evaluation by attaching an additional document.

**Manager:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: Click or tap to enter a date.

**Employee:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: Click or tap to enter a date.