



Performance Appraisal

For Employees in Classified Information Technology Positions
Represented by the Oregon Public Employees Union

Section One: Employee Information

Employee Name: _____ Position Number: _____
 Identification Number: _____ — — Classification Title: _____
 Department: _____ Classification Number: _____
 Date of Hire: _____ Salary Eligibility Date: _____
 Competency Level: (Check One) Level One Level Two Level Three
 Evaluation Period: Beginning Date: _____ Ending Date: _____
 Salary: (Check one) At or Below Control Point Above Control Point
 Rating: (Check one) Trial Service Annual Special Merit

INSTRUCTIONS

1. Review the Performance Appraisal Form in detail.
2. Evaluate employee's performance for the entire rating period.
3. For each factor, select and circle the rating that best describes employee ability.
4. Any rating of 1 or 4 requires justification under comments in each competency or in summary.
5. Review with the employee. A section is available for employee comments.
6. Forward signed and completed Performance Appraisal form to the Human Relations office.

Section Two: Performance Competencies

	1 Does Not Fully Meet Standards: Has not consistently met job requirements and may occasionally demonstrate unsatisfactory performance	2 Meets Standards: Consistently meets all job standards and may occasionally exceed performance expectations or objectives.	3 Consistently Exceeds Standards: Consistently exceeds all performance expectations/objectives.	4 Outstanding: Regularly makes exceptional contributions which have a materially positive impact on the organization or department.
Technical Knowledge: encompasses those skills and abilities within a specialty area(s) of Information Technology required to deliver products and services that support business processes	1 Demonstrates limited understanding of necessary technical knowledge to support business processes	2 Demonstrates average understanding of necessary technical knowledge to support business processes	3 Demonstrates full understanding of necessary technical knowledge to support business processes	4 Demonstrates exceptional understanding of technical knowledge to support business processes
	Performance Standard: Comments:			
Work Coordination: encompasses those skills and abilities required to organize and prioritize work, respond to conflicting business needs, and work collaboratively with a group of people to produce a product or service	1 Demonstrates inability to coordinate work and set priorities, tends to be uncooperative and work product requires constant revision and correction	2 Demonstrates average ability to coordinate work and set priorities, cooperates with others; willing to compromise, and produces average work product; requires some revision	3 Demonstrates very good ability to coordinate work and set priorities, readily cooperates; promotes team work, and work is of very good quality; few revisions required	4 Demonstrates excellent ability to coordinate work and set priorities, very willing to cooperate with others; inspires positive work relations, and work is of exceptionally high quality; virtually error free
	Performance Standard: Comments:			

Section Two: Performance Competencies Cont.

	1 Does Not Fully Meet Standards: Has not consistently met job requirements and may occasionally demonstrate unsatisfactory performance	2 Meets Standards: Consistently meets all job standards and may occasionally exceed performance expectations or objectives.	3 Consistently Exceeds Standards: Consistently exceeds all performance expectations/objectives.	4 Outstanding: Regularly makes exceptional contributions which have a materially positive impact on the organization or department.
Problem Solving/ Prevention: encompasses those skills and abilities required to analyze issues within a specialty area(s) and evaluate alternatives to achieve quality and technical solutions that support the long and short-term goals of the users and departments, and the mission of the university.	1 Is unable to use problem solving and decision making tools and processes and is uncertain of own judgement; defers decisions to others	2 Is usually able to use problem solving and decision making tools and processes and generally uses good judgement supporting the goals of the users and departments, and the mission of the university	3 Demonstrates the ability to consistently use problem solving and decision making tools and processes and demonstrates the ability to apply careful reasoning to decision making supporting the goals of the users and departments, and the mission of the university	4 Shows an advanced ability to use problem solving and decision making tools and processes and reasoning is logical, clear and concise; comes to sound conclusions quickly and acts decisively on them in the support of the goals of the users and departments, and the mission of the university
	Performance Standard: Comments:			
Communication & Service: encompasses those skills and abilities required to effectively exchange information in order to interpret the needs of our customers, respond to their needs, achieve user satisfaction, and teach varying levels of information technology tools to groups or individuals.	1 Needs to improve tact and diplomacy skills; aggressive approach occasionally results in miscommunication problems; reluctantly helpful; does not respond to customer needs and is reluctant to teach others	2 Generally tactful and courteous; usually able to communicate satisfactorily; willing to be helpful; generally responds to customer needs and is usually able to teach others	3 Consistently tactful and courteous; able to communicate effectively; strives to be helpful; consistently responds to customer needs and teaches others	4 Exceptionally tactful and courteous; has excellent communication skills; goes out of the way to be helpful; proactively insures that the customers are delighted and is an excellent teacher
	Performance Standard: Comments:			
Accountability: encompasses those skills and abilities required to make decisions and take responsibility for work.	1 Resists acceptance of responsibility for own decisions and work	2 Accepts normal responsibility for own decisions and work	3 Accepts responsibility beyond normal requirements for own decisions and work	4 Actively seeks more responsibility and actively accepts responsibility for own decisions and work
	Performance Standard: Comments:			
<p>PERFORMANCE STANDARDS: Performance standards form the framework by which performance will be evaluated. Performance standards can either be specific skills and/or behaviors from each area of competence, or other appropriate standard. Select standards that are relevant to the employee's work assignments. Establish what the employee is expected to achieve during the review period—both ongoing and specific skills and competencies.</p> <p>At the beginning of the performance appraisal period, the supervisor and the employee should discuss the competencies and performance standards upon which the employee will be evaluated. If the employee has input in developing the standard, the supervisor can expect fewer disagreements or disappointments later.</p>				

Section Three: Performance Objectives

	1 Does Not Fully Meet Standards: Has not consistently met job requirements and may occasionally demonstrate unsatisfactory performance	2 Meets Standards: Consistently meets all job standards and may occasionally exceed performance expectations or objectives.	3 Consistently Exceeds Standards: Consistently exceeds all performance expectations/objectives.	4 Outstanding: Regularly makes exceptional contributions which have a materially positive impact on the organization or department.
Objective # 1:	1	2	3	4
	Performance Standard: Weight: (Check one) Critical Major Secondary Results: Comments:			
Objective # 2:	1	2	3	4
	Performance Standard: Weight: (Check one) Critical Major Secondary Results: Comments:			
Objective # 3:	1	2	3	4
	Performance Standard: Weight: (Check one) Critical Major Secondary Results: Comments:			
Objective # 4:	1	2	3	4
	Performance Standard: Weight: (Check one) Critical Major Secondary Results: Comments:			

Section Three: Performance Objectives

	1 Does Not Fully Meet Standards: Has not consistently met job requirements and may occasionally demonstrate unsatisfactory performance	2 Meets Standards: Consistently meets all job standards and may occasionally exceed performance expectations or objectives.	3 Consistently Exceeds Standards: Consistently exceeds all performance expectations/objectives.	4 Outstanding: Regularly makes exceptional contributions which have a materially positive impact on the organization or department.
Objective # 5:	1	2	3	4
Performance Standard: Weight: (Check one) Critical Major Secondary Results: Comments:				

Discussion of how work was performed:

Unplanned Accomplishments:

OBJECTIVES : Performance objectives are the heart of the merit pay program. This section records reasonable outcomes or projects for the employee to accomplish during the upcoming appraisal period. There is no restriction on the number of objectives that the supervisor and the employee develop for the next evaluation period. Identify as many as you need, but make sure the workload is realistic.

Good performance objectives meet the following SMART criteria:

S = Specific: State clearly what is to be accomplished in concrete terms that can be easily observed and mutually understood.

M = Measurable: Objectives should be quantifiable, stating exactly what the criteria for success is, how that success will be tracked and measured, and whether the measurement tools are available.

A = Attainable: Can the result be realistically achieved? (Is the process used workable and within the employee's control? Are the needed resources available? Is the time frame reasonable? Is the objective a "reachable" stretch?)

R = Realistic: Based upon the employee's knowledge of the job, the objective should be linked vertically to the organization's goals, as well as being difficult, yet feasible.

T = Time Bound: Each objective should have a clearly defined time frame.

PERFORMANCE STANDARD: For each objective that you have listed, indicate the target results, either as a quantity or quality. Indicate the manner in which the end result will be achieved in a satisfactory (meets standards) manner.

Standards are:

- Relevant to objectives
- Challenging but attainable
- Clearly defined and documented
- Understood by and acceptable to constituencies
- Appropriate considering existing realities
- Revised as appropriate

WEIGHT : The supervisor indicates the relative importance of the objective-critical, major, or secondary. Following is a general guideline for defining priorities.

Critical : Must be met or exceeded in order for the unit to meet its objectives. (Planned objectives should include no more than two or three objectives that are critical in nature.)

Major: Must be met or exceeded in order for an individual to be effective.

Secondary : Should be met, but will not preclude the individual/unit effectiveness.

Section Four: Summary

Summary Rating: (Circle One)	1 Does Not Fully Meet Standards: Has not consistently met job requirements and may occasionally demonstrate unsatisfactory performance	2 Meets Standards: Consistently meets all job standards and may occasionally exceed performance expectations or objectives.	3 Consistently Exceeds Standards: Consistently exceeds all performance expectations/objectives.	4 Outstanding: Regularly makes exceptional contributions which have a materially positive impact on the organization or department.
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Commentary Supporting Summary Rating:

Developmental Needs/Plans:

Is training required? If so, specify:

Additional resources needed to increase effectiveness:

SUMMARY RATING: The supervisor must consider all aspects of the employee's performance, including the relative importance of each of the objectives, and select the rating level that most accurately describes the overall performance during the evaluation period. Focus on job performance. Develop a rating based on how well the employee performed in relation to the competencies and performance objectives, the relative weight given to each objective, and other accomplishments.

If the employee receives less than a satisfactory evaluation, the supervisor should meet with the employee within thirty (30) days of the evaluation to review, in detail, the alleged deficiencies. If an employee is rated "Does Not Fully Meet Standards" and the supervisor recommends withholding the performance increase, the supervisor must give notification in writing, including the reasons for withholding the increase, at least fifteen (15) days prior to the employee's eligibility date. New employees who have not had an opportunity to demonstrate their capabilities should not be rated "Does Not Fully Meet Standards".

Section Five: Signatures

Rating Performed by:

Supervisor's Signature: _____ Date: _____

Rating Reviewed by: (Optional)

Signature: _____ Date: _____

Reviewer's Comments:

Employee's signature is required only to indicate that the employee has read the performance appraisal.

Employee Signature: _____ Date: _____

Employee Comments:

Appointing Authority:

Signature: _____ Date: _____

Section Six: Further Comments

Summary of Evaluation:

Employee Comments: