

PEOPLEADMIN Performance Evaluations

Tuskegee University

Office of Human Resources

HOW TO GUIDE FOR MANAGERS/SUPERVISORS: PERFORMANCE GOALS & FEEDBACK

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SAMPLE PERFORMANCE EXPECTATIONS/GOALS

The following samples of performance expectations/goals which can be generated during the PEOPLEADMIN performance review. Some of these expectations are designed to be job specific, others are more general in nature. Be sure to tailor these samples to meet the needs of the specific job positions that you supervise.

WORK PRODUCT

The quality and quantity of work produced by the employee

1. You will be expected to draft and proof written correspondence, such that few errors are evident and few corrections are needed.
2. You will be expected to work toward professional certification in your field/discipline.
3. You will be expected to participate in 40 hours of job related professional development classes offered by the Human Resource Office.
4. When working with chemical products, you will be expected to always make safety the highest priority and read the instructions on the label for proper usage.
5. You will be expected to perform work in a professional manner and complete assignments on time.
6. You will be expected to accept job assignments willingly and perform them in a satisfactory manner.
7. You are expected to familiarize yourself with the office procedures, rules and regulations and to be able to answer routine questions regarding the same.
8. You will be expected to keep organized, neat, and accurate records.
9. You will be expected to proofread all written or typed materials for errors and keep all publications for the office updated as needed.
10. You will be expected to use your experience and training to complete your assignments in a satisfactory manner.
11. You will be expected to pay attention to detail when completing assignments.
12. You will be expected to keep up with current changes in laws related to your position.
13. You will be expected to type most documents with no typos or formatting errors.
14. You will be expected to check spelling on all documents before sending them out.
15. You will be expected to complete tasks as assigned.
16. You will be expected to work at a rate that is similar to teammates so teamwork goes smoothly.
17. You will be expected to develop an organized filing system that enables others to access necessary files in case of your absence.
18. You will be expected to prepare and process purchase requisitions and receiving reports timely.
19. You will be expected to establish, organize, and maintain all departmental files.
20. You will be expected to keep current balances of all budget accounts.
21. You will be expected to maintain a to do list to help you stay on top of dead lines.
22. You will be expected to observe time reporting rules and regulations.
23. You will be expected to refrain from making unauthorized solicitations while on duty or on University premises.

24. You will be expected to meet production standards for your position. (Be sure to list benchmarks related to the position).
25. You will be expected to ensure that routine office procedures (i.e. folders pulled, calendars created and distributed, folders filed, mail delivered and picked up, supplies kept current, student workers supervised) are completed on a daily basis.
26. You will be expected to observe University policies.
27. You will be expected to account for all state funds and property which is assigned to you.

DEPENDABILITY

Being where he/she should be doing what he/she is supposed to do

1. You will be expected to complete all work assignments by their deadlines except under unusual circumstances.
2. You will be expected to spend a little extra time preparing for the job and then to perform the assigned task satisfactorily.
3. You will be expected to notify your supervisor [or the timekeeper] if you cannot come in to work in accordance with departmental leave policy.
4. You will be expected to keep accurate records necessary for expense reports, such as mileage, meals, and lodging.
5. You will be expected to report to work at 7:45 a.m. and observe scheduled work and meal breaks.
6. You will be expected to attend scheduled meetings and arrive for these meetings on time.
7. You will be expected to call the Director if you must be late or absent according to departmental leave policy.
8. You will be expected to not leave your office without making sure your phone is covered.
9. You will be expected to reduce tardiness and report to work on time.
10. You will be expected to be at your duty station and perform your duties at all times except during official breaks.
11. You must not leave your assigned work area without permission.
12. You will be expected to use sick leave only for your own personal illness.
13. You will be expected to have your employee I.D./time card when you report to work.
14. You will be expected to report for duty wearing your assigned uniform.
15. You must refrain from loafing, roaming, loitering, or leaving your workstation without proper notification.
16. You will be expected to refrain from conducting personal business on University time.
17. You will be expected to make sure your office/building is secure when you leave for the day.
18. You will be expected to: Arrive at work at 7:45 a.m. and depart at 4:30p.m. Take a 45-minute lunch break from 11:45 a.m. to 12:30 p.m. And take one fifteen-minute work break in the morning and one fifteen-minute work break in the afternoon.
19. You will be expected to notify the Director or Assistant Director when leaving your work station during regular work hours as well as sign in and out on the checkout board.
20. You will be expected to request leave in advance at times that do not hinder office operation.

21. You will be expected to perform office security procedures before leaving at the end of the day.
22. You will be expected to reduce your absenteeism rate. *
23. (* Note: Absenteeism related to a serious illness could be protected by FMLA or ADA. Consult your HR Office).

COOPERATIVENESS

Working with people

1. You will be expected to be more friendly while performing your daily tasks.
2. You will be expected to refrain from gossiping with other employees.
3. You will be expected to assist other areas of the office/department when your work has been completed.
4. You will be expected to accept the tasks you are assigned without complaining.
5. You will be expected to observe the University smoking policy. Smoke only in approved areas and put your cigarette butts in ash trays/garbage. Do not throw them on the ground.
6. You will be expected to work as a team member.
7. You will be expected to contribute to the work group's overall productivity as appropriate, helping coworkers when possible.
8. You will be expected to show respect for others at all times.
9. You will be expected to share your ideas with other employees.
10. You will be expected to be courteous to fellow employees, students, and faculty.
11. You will be expected to maintain a friendly, helpful, supportive and team-like atmosphere among coworkers.
12. You will be expected to refrain from interfering with coworker's productivity while at work.
13. You will be expected to refrain from "casually visiting" with others while at work and to discourage others from "casually visiting" with you while at work. This reduces productivity.
14. You will be expected to register your vehicle for parking on University property.
15. You will be expected to follow instructions without complaining or arguing.
16. You will be expected to demonstrate respect for coworkers and supervisors (i.e., is not abrupt or rude, does not engage in workplace gossip or conflict, is not demeaning of others, etc.).

ADAPTABILITY

Adjusting to change

1. You will be expected to look for ways to streamline office procedures without jeopardizing the accuracy of the overall procedure.
2. You will be expected to work well with the public.
3. You will be expected to look for ways to improve your own job and the jobs of your subordinates.
4. You will be expected to work without complaining or hesitating when trying new methods or procedures.
5. You will be expected to adapt work habits to new or unexpected circumstances. Notify and lead others as appropriate when circumstances change suddenly.

6. You will be expected to accept and be responsive to constructive criticism without taking it personally.
7. You will be expected to attend technology and computer workshops to improve computer literacy.
8. You will be expected to be open to changes in office policy or personal goals.
9. You will be expected to willingly accept the new performance appraisal system.
10. You will be expected to be sure your actions are consistent with agency goals.
11. You will be expected to present suggestions for changes in policy/procedures in writing to the director.
12. You will be expected to accept and implement decisions regarding changes in policy/procedure without complaining or arguing.
13. You will be expected to willingly accept input from others regarding ideas for improvement.

COMMUNICATION

Giving and receiving information

1. You will be expected to answer the phone using the standard greeting, "Southeastern,[Department name],[Employee Name], How may I help you?"
2. You will be expected to answer the phone courteously within 3 rings.
3. You will be expected to take accurate and detailed phone messages.
4. You will be expected to communicate clearly when speaking or writing.
5. You will be expected to keep your supervisor informed of problems as they develop.
6. You will be expected to listen carefully and ask questions when needed to clarify requests.
7. You will be expected to use appropriate communication tools for the situation.
8. You will be expected to answer the telephone with a 'smile in your voice,' with energy, and a spirit of helpfulness.
9. You will be expected to improve communication of office policies to all staff.
10. You will be expected to open, sort and prioritize mail into three categories: urgent, routine, and junk mail.
11. You will be expected to speak to people clearly and with an appropriate tone of voice, and listen to what they have to say to you.
12. You will be expected to avoid overreacting when calm communication with another person can solve a problem.
13. You will be expected to listen carefully to clients and coworkers. Do not ignore them.
14. You will be expected to choose your words carefully, speak clearly and respectfully to clients so they can understand you the first time you say something.
15. You will be expected to check voice mail regularly and return all messages the same day as received, if possible.
16. You will be expected to report all accidents or incidents.
17. You will be expected to maintain confidentiality of University, student or employee information.
18. You will be expected to use University bulletin boards for official communications only.

19. You will be expected to provide staff with messages, both verbal and written, in a clear and timely fashion.
20. You will be expected to listen to and allow communicator to complete delivery of message prior to responding or asking questions.

DAILY DECISION MAKING/ PROBLEM SOLVING

Thinking on the job

1. You will be expected to resolve daily problems independently.
2. You will be expected to refer all questions you cannot answer to the appropriate person.
3. When bringing a problem to your supervisor's attention, be prepared to recommend a possible solution.
4. You will be expected to work independently to solve problems or seek needed information.
5. You will be expected to gather all facts before resolving a problem, even if you have to call the parties involved back.
6. You will be expected to make decisions only after getting input from the people who will be affected and weighing all the different issues.
7. You will be expected to think more openly about new possibilities. Try new ways of doing things using new technology.
8. You will be expected to use good judgment in making decisions regarding routine operating procedures (i.e. assessing crisis situations, scheduling/rescheduling of appointments, handling late arrivals, handling phone messages, etc.).
9. You will be expected to consult with your supervisor regarding situations outside the scope of your authority.
10. You will be expected to recognize problems which need to be addressed and present them in writing to the Director (i.e. problems with procedure, scheduling, etc.).
11. You will be expected to act promptly to resolve or report rule violations or threats to workplace safety and security.
12. You will be expected to observe and enforce the Violence in the Workplace Policy: zero tolerance for violence of any kind.

SERVICE TO CLIENTS/PUBLIC

1. You will be expected to be courteous to the public at all times.
2. You will be expected to listen to the clients carefully in order to determine their needs.
3. You will be expected to follow-up with clients to make sure their needs have been met.
4. You will be expected to maintain confidentiality of all conversations, events, etc. that occur in your office.
5. You will be expected to exhibit patience with students and faculty in solving their problems.
6. You will be expected to greet people entering your office with poise, cheerfulness and a smile.
7. You will be expected to demonstrate service to students, faculty, and staff through attitude and written or oral communication.
8. You will be expected to train your staff on basic office procedures through cross training in order to provide better customer service.

9. You will be expected to follow the established departmental dress code.
10. You will be expected to follow-up customer complaints when needed.
11. You will be expected to follow-up with the person originating the work order after it is complete to determine their level of satisfaction.
12. If someone has a problem that falls outside of your job, send the person to the right place rather than spending excessive amounts of time trying to help them yourself.
13. You will be expected to provide well maintained equipment for the state employees who use it.
14. You will be expected to demonstrate politeness and respect in all interactions with clients/individuals both on the phone and in person (i.e., greet clients pleasantly, give accurate information, listen carefully to determine the person's needs).
15. You will be expected to demonstrate sensitivity to clients' needs for confidentiality (i.e., not unnecessarily asking clients for personal information unless absolutely necessary).

USE OF EQUIPMENT AND MATERIALS

1. You are expected to learn and follow proper use and operation of the equipment to which you are assigned.
2. You are expected to replace broken or worn parts promptly and always keep an accurate maintenance log.
3. You are expected to perform preventive maintenance on individual equipment per manufacturer's specifications.
4. You will be expected to observe proper safety rules when operating machinery or equipment.
5. You will be expected to use the proper equipment or tools for completing assigned tasks.
6. You will be expected to use proper equipment and tools for heavy lifting tasks.
7. You will be expected to safely use equipment and materials for their intended purpose.
8. You will be expected to report any damage to equipment, tools, or vehicles according to University policy.
9. You will be expected to use computer, fax machine, and photocopy machine as instructed and without abusing the equipment.
10. You will be expected to avoid getting food or drink around expensive pieces of equipment or machines or dropping small items like paper clips into them.
11. You will be expected to use equipment, materials, and supplies for official use only.
12. You will be expected to wear proper safety equipment (i.e. goggles, masks, etc.).
13. You will be expected to properly use and maintain all equipment.
14. You will be expected to receive and provide proper training in the use of all equipment.

PROJECT PLANNING AND IMPLEMENTATION

1. You will be expected to set specific goals and priorities for completing assignments.
2. You will be expected to design realistic work methods, procedures and time tables for achieving project goals.
3. You will be expected to monitor progress toward achieving goals and make modifications if needed.

4. You will be expected to continue to look for ways to streamline and automate processing procedures. Develop a Procedures Manual that outlines each procedure and the related forms to be used. Also, create flow charts for each of these procedures.

WORK GROUP MANAGEMENT

1. You will be expected to plan and assign the work of your subordinates effectively and fairly.
2. You will be expected to set realistic but challenging goals.
3. You will be expected to provide resources, guidance, and training for subordinates to do their jobs.
4. You will be expected to recommend corrective action or discipline when appropriate.
5. You will be expected to plan and account for the use of overtime.
6. You will be expected to train, supervise, and review the work of student workers.
7. You will be expected to delegate assignments to subordinates when appropriate.
8. You will be expected to cross train subordinates to ensure services are provided when someone is absent.
9. You will be expected to conduct monthly safety meetings.
10. You will be expected to treat all subordinates equally.
11. You will be expected to give equal access to training.
12. You will be expected to make sure all employees have some challenging work to do.
13. You will be expected to counsel employees when they are having difficulty doing their work correctly and to make a note of it.
14. You will be expected to maintain a good working relationship with your subordinates and to act as a positive role model for your employees.
15. You will be expected to do your work in an enthusiastic and effective manner.
16. You will be expected to work in a way that inspires confidence and trust among your subordinates.
17. You will be expected to counsel employees privately behind closed doors.
18. You will be expected to maintain a smooth functioning work group committed to customer service.

PERFORMANCE PLANNING AND REVIEW

1. You will be expected to communicate performance expectations clearly.
2. You will be expected to conduct thorough and timely performance planning sessions with subordinates.
3. You will be expected to document subordinates job performance and provide helpful feedback.
4. You will be expected to complete fair performance appraisals when they are due.
5. You will be expected to avoid rating biases.
6. You will be expected to discuss all performance planning, documentation, and review materials with me as the reviewer (Budget Unit Head) prior to the meetings with your subordinates.

SAMPLE PERFORMANCE REVIEW COMMENTS

The rating scale for **PEOPLEADMIN Performance Review** is made up of three (3) factors: Needs Improvement, Meets Requirements, and Exceeds Requirements. Any factor rated “Exceeds” or “Needs Improvement” MUST have performance comments. For any factor, performance comments should support the rating given. If there have been counseling sessions, letters of commendation or reprimand, or unofficial performance reviews within the rating period, the supervisor should keep documentation on file and site these occurrences in the performance comments on the official rating.

Below are examples of comments that would support individual ratings. **These are generic in nature and examples only.** Performance comments should be tailored to the individual employee and be based on the employee’s individual performance expectations.

WORK PRODUCT

Needs Improvement:

- Is not as careful in checking work product for errors as he/she could be.
- Tends to miss small errors in work product.
- Required paperwork is completed late or is only partially complete.

Meets Requirements:

- Does not require constant supervision.
- Error rate is acceptable, and all work is completed timely.
- Forms and required paperwork are completed on time with minimal errors.

Exceeds Requirements:

- Managers and co-workers have commented on high levels of accuracy and work productivity.
- Takes pride in work and strives to improve work performance.
- All memos, reports, forms and correspondence are completed on time with no errors.

DEPENDABILITY

Needs Improvement:

- Occasionally calls in to work without prior approval, resulting in unscheduled absences.
- Occasionally arrives late to work.
- Sometimes does not make sure all work is completed before leaving for the day.
- Occasionally leaves work early.

Meets Requirements:

- Consistently arrives to work on time.
- Makes sure work area is covered at all times.
- Has had no unscheduled absences, except for documented emergencies.

Exceeds Requirements:

- Has a good attendance record.
- Can always be counted on to work overtime when necessary without complaint.

COOPERATIVENESS

Needs Improvement:

- Displays occasional negativity when working with others.
- Rarely offers to assist others in the office.
- Makes negative comments that affect working relationships with others.

Meets Requirements:

- Is usually able to answer customer questions.
- Maintains good working relationships with coworkers.

Exceeds Requirements:

- Demonstrates “team player” behavior views individual success as imperative to group success.
- Direct, straightforward, honest and polite.

ADAPTABILITY

Needs Improvement:

- Gets flustered in unusual situations.
- Does not always make the best decisions to fit the situation.

Meets Requirements:

- Usually adjusts well to changes in the work place.
- Maintains good customer service relations, even under stress.

Exceeds Requirements:

- Looks for ways to streamline procedures to improve efficiency and customer service.
- Sets priorities and adjusts them as needed when unexpected situations arise.

COMMUNICATION

Needs Improvement:

- The supervisor/department head has received a few complaints about contradictory or bad information being given out by the employee.
- Phone messages are often unclear or incomplete.

Meets Requirements:

- Takes messages, writes correspondence, deals with customers and coworkers with sufficient attention to detail.
- Reports are accurate and well written using proper grammar and punctuation.

Exceeds Requirements:

- Students and coworkers feel comfortable coming to this employee with questions and comments.
- Comes to supervisor/department head with any questions that employee does not know off-hand

DAILY DECISION MAKING/ PROBLEM SOLVING

Needs Improvement:

- Needs to develop analytical skills necessary to weigh options and choose the best way to deal with situations.
- Spends too much time focusing on less important aspects of daily job.

Meets Requirements:

- Often offers workable solutions to problems.
- Uses good judgment in solving problems and working with others.
- Uses PPR ratings in making decisions related to new hires, promotions and merit increases.

Exceeds Requirements:

- Can zero in on the cause of problems and offer creative solutions.
- Displays strong analytical skills.

SERVICE TO CLIENTS/PUBLIC

Needs Improvement:

- Gets annoyed with clients who ask too many questions.
- Frequently forgets to follow through on customer requests.

Meets Requirements:

- Usually maintains a competent and professional demeanor in dealing with clients and the public.
- Courteous and knowledgeable.
- Tries to be helpful.

Exceeds Requirements:

- Answers all questions promptly and accurately.
- Forwards any complaints or problems to supervisor immediately.

USE OF EQUIPMENT AND MATERIALS

Needs Improvement:

- Doesn't heed warning messages on equipment.
- Sometimes forgets to turn equipment off at the end of the day.
- Doesn't always get equipment serviced as recommended by the manufacturer.

Meets Requirements:

- Takes good care of equipment and uses supplies efficiently.
- Turns off and secures all equipment at the end of the shift.

Exceeds Requirements:

- Quickly learns new software programs.
- Uses queries and reports to maximize efficiency in the office and find errors.

PROJECT PLANNING AND IMPLEMENTATION

Needs Improvement:

- Does not keep supervisor informed of potential problems as they arise.
- Project plans are poorly designed.
- Project plans are not carried out as assigned or on time.

Meets Requirements:

- Prepares project plans on time and in sufficient detail.

- End of year statements are complete and accurate.
- Maintains and monitors progress of project plan in order to stay on target.

Exceeds Requirements:

- Gets the most out of scarce resources.
- Projects normally are within budget and are well planned.

WORK GROUP MANAGEMENT

Needs Improvement:

- Assumes others should know what to do and how to do it with little or no training.
- Frequently becomes impatient when things aren't done their way.

Meets Requirements:

- Draws on the knowledge and skills of others.
- Available when needed and has an open door policy for subordinates.
- Assigns work fairly and resolves disputes and grievances of subordinates fairly.

Exceeds Requirements:

- Very supportive of coworkers and subordinates attempts at improvement.
- Sets an example for subordinates in following departmental and university policy and procedures.

PERFORMANCE PLANNING AND REVIEW

Needs Improvement:

- Although planning sessions were completed, they were not completed within Civil Service mandated timelines.
- Did not meet personally with the employee to go over appraisals.

Meets Requirements:

- All PPR's were completed by the anniversary dates of all subordinates.
- Works with employees in setting mutual goals.
- Makes an effort to counsel employees and document performance (both positive and negative) throughout the year.
- Maintains a supervisor file that contains documentation of performance on each subordinate throughout the year.
- Has had no unrated PPR's or untimely planning sessions in this rating year. Always completes PPR's well within the 60 day deadline date.

Exceeds Requirements:

- Is proactive in performance evaluations.
- Has an open door policy for all subordinates.