



NORTH CAROLINA AGRICULTURAL AND TECHNICAL STATE UNIVERSITY

**ANNUAL PERFORMANCE REVIEW
EHRA NON-FACULTY EMPLOYEES**

ANNUAL PERFORMANCE REVIEW EHRA NON-FACULTY EMPLOYEES

INSTRUCTIONS

1. An annual performance evaluation is required for all EHRA non-faculty employees.
2. Performance evaluations will cover the period from July 1 to June 30. Normally, evaluations should be completed in late June of each year, consistent with the beginning of the fiscal year.
3. Performance goals and objectives will also cover the period from July 1 to June 30. The performance goals and objectives ought to be aligned with the strategic priorities of the Division, Department, School or College, and the University. The goals need to be specific, measurable, achievable, results-oriented and time based (SMART). These factors ought to be used to establish alignment and priority.
4. Professional development planning is also a critical part of the performance planning and evaluation process. Each administrator needs a professional development plan focused on growth and development in the core leadership behaviors and competencies.
5. For an administrator new to a position during the year, performance goals and objectives ought to be established and discussed within the first thirty (30) days of employment. The evaluation should reflect the time period from the beginning of his/her appointment until the end of June. If an administrator has not been in a position long enough for his/her performance to be evaluated in June, an interim evaluation should be conducted before December, with an additional evaluation and planning discussion conducted in June.
6. The performance planning and evaluation will be completed using the "ANNUAL PERFORMANCE REVIEW EHRA NON-FACULTY EMPLOYEES" instrument.
7. As a confidential personnel record, a completed copy of the evaluation should be maintained in the employee's personnel file in the Division of Human Resources and the respective unit's secured files.
8. A copy should be submitted to the Division of Human Resources by **July 30** each year and signed by both the administrator and the evaluator.

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NAME:		BANNER ID#:	
TITLE:		REVIEW PERIOD:	
COLLEGE OR DIVISION:			
SUPERVISOR:		SUPERVISOR TITLE:	
<p>List your current goals and objectives for the beginning of the fiscal year and rate your performance on how well you achieved them. If not achieved, in the summary comments section below, describe your future steps for the goal or objective, e.g. will goal continue on, be dropped or modified, etc.</p> <p>RATING SCALE: EE = EXCEEDING EXPECTATIONS ME = MEETING EXPECTATIONS N = NOT MEETING EXPECTATIONS</p>			
PART 1: GOALS AND OBJECTIVES FOR CURRENT EVALUATION YEAR 20		SELF ASSESSMENT	EVALUATOR RATING
1.			
2.			
3.			
4.			
5.			
SUMMARY COMMENTS ON PERFORMANCE OF CURRENT YEAR BY ADMINISTRATOR			
SUMMARY COMMENTS ON PERFORMANCE OF CURRENT YEAR BY EVALUATOR			

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PART 2: PERFORMANCE ASSESSMENT – INSTITUTIONAL GOALS

The UNC system establishes these institutional goals for all employees covered by the University EHRA Non-Faculty Performance Appraisal Policy. Supervisors must use these goals as written. These descriptions are written at the “meeting expectations” level of performance. Rate your performance on each of the areas listed below.

For additional information on institutional goals, refer to the three-column guide for institutional goals that provides expectations at the not meeting, meeting, and exceeding levels of performance located on the Performance Management website at: <http://www.ncat.edu/hr/documents/perf-mgmt/goals.pdf>

1 Expertise: Produces work that is accurate, thorough, and demonstrates sufficient analysis and decision-making to meet the requirements of the employee’s position and profession. Makes efficient and appropriate use of materials and documents work appropriately. Looks for ways to improve efficiency or quality. Maintains technical skills and relevant professional credentials.	Not Meeting Expectation	Meeting Expectation	Exceeding Expectation
SELF ASSESSMENT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
EVALUATOR RATING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2 Accountability: Completes required volume of work by established deadlines and stays productive throughout workday. Generally completes work with few reminders and/or infrequent oversight. Takes sufficient/appropriate measures to plan and organize work, prioritize tasks, and set realistic goals. Seeks needed information to complete work and timely communicates status with relevant parties.	Not Meeting Expectation	Meeting Expectation	Exceeding Expectation
SELF ASSESSMENT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
EVALUATOR RATING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3 Customer-Oriented: Listens to determine the most effective way to address customer needs and concerns. Shows a solid understanding of customer needs, seeks out customer input to better understand needs, and develops ideas to meet those needs. Follows through on commitments, despite time pressures or obstacles, and maintains relevant communication with customers until job is completed. Maintains a professional and respectful tone and exhibits diplomacy when dealing with frustrated individuals or during sensitive or confrontational situations.	Not Meeting Expectation	Meeting Expectation	Exceeding Expectation
SELF ASSESSMENT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
EVALUATOR RATING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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4	<p>Team-Oriented: Communicates and engages directly, clearly, and tactfully with colleagues. Provides feedback and healthy dialogue on performance and operational issues, as requested, willingly adapts to change, and adheres to decided actions. Makes decisions with others in mind, and willingly performs additional duties when team members are absent, during times of increased workload, or as otherwise required by management to meet business needs. Absences are infrequent and do not place an undue burden on supervisor or colleagues.</p>	Not Meeting Expectation	Meeting Expectation	Exceeding Expectation
	SELF ASSESSMENT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	EVALUATOR RATING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	<p>Compliance & Integrity: Complies with personnel and equal opportunity policies, including prohibitions on harassment, discrimination, and violence, and all other policies, including appropriate use of university resources. Complies with all safety requirements for the position, including successful completion of training and proper use of personal protective equipment. Chooses ethical action under pressure, avoids situations that are inappropriate or that present a conflict of interest, and holds self and others accountable for ethical decisions. Appreciates individual/cultural differences and treats all people with dignity and respect.</p>	Not Meeting Expectation	Meeting Expectation	Exceeding Expectation
	SELF ASSESSMENT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	EVALUATOR RATING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	<p>Supervision (for supervisors only): Provides adequate stewardship of assigned resources, including budget, space, equipment, and staffing. Provides clear objectives that foster work unit development and align with university values and goals. Provides candid, timely, and constructive feedback on performance and behavior, hires individuals with the qualities and skillsets for success, and contributes to meeting University EO and affirmative action goals. Serves as role model and engenders trust, commitment, and civility.</p>	Not Meeting Expectation	Meeting Expectation	Exceeding Expectation
	SELF ASSESSMENT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	EVALUATOR RATING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OVERALL YEAR PERFORMANCE RATING				
		Not Meeting Expectation	Meeting Expectation	Exceeding Expectation
	SELF ASSESSMENT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	EVALUATOR RATING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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PART 3: LIST YOUR GOALS AND OBJECTIVES FOR UPCOMING PERFORMANCE CYCLE YEAR 20		Target Completion Date
1.		
2.		
3.		
4.		
5.		

EVALUATOR'S COMMENTS ON PROJECTED OBJECTIVES

PART 4: PROFESSIONAL DEVELOPMENT PLAN

List specific activities that clearly state your professional development plan for the new fiscal year:

Target Completion Date

1.		
2.		
3.		

OFF-CYCLE REVIEWS

- | | |
|--|---|
| <ul style="list-style-type: none"> • Rate each Individual and Institutional Goal. <ul style="list-style-type: none"> - 1 = Not Meeting Expectations - 2 = Meeting Expectations - 3 = Exceeding Expectations • Multiply the Weight by the Rating to get the Score for each goal. Use two decimal places.
(Example: 10% X 2 = .20) | <ul style="list-style-type: none"> • Add all of the Scores together to assign a Final Overall Rating: <ul style="list-style-type: none"> - 1.00 to 1.69 = Not Meeting Expectations - 1.70 to 2.69 = Meeting Expectations - 2.70 to 3.00 = Exceeding Expectations • Provide comments and signatures on the next page. |
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#	INSTITUTIONAL GOALS <small>(see descriptions in performance plan)</small>	WEIGHT	X	RATING	=	SCORE
1	Expertise	0.00%	X		=	0
2	Accountability	0.00%	X		=	0
3	Customer-Oriented	0.00%	X		=	0
4	Team-Oriented	0.00%	X		=	0
5	Compliance & Integrity	0.00%	X		=	0
6	Supervision <i>(if applicable)</i>	0.00%	X		=	0
#	INDIVIDUAL GOALS <small>(title only from performance plan)</small>	WEIGHT	X	RATING	=	SCORE
1		0.00%	X		=	0
2		0.00%	X		=	0
3		0.00%	X		=	0
4		0.00%	X		=	0
5		0.00%	X		=	0
FINAL OVERALL RATING (mark the appropriate rating based on total score)					=	0
<u>OVERALL RATING</u>						
NOT MEETING EXPECTATIONS		MEETING EXPECTATIONS		EXCEEDING EXPECTATIONS		
OR: Employee was not evaluated due to ...				Insufficient Time (Fewer than 6 months)		
				Extended Leave of Absence		
EVALUATOR'S COMMENTS ON DEVELOPMENT PLAN						

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LEADERSHIP DEVELOPMENT PROGRAMS THROUGH HUMAN RESOURCES

Program Attended (SDP, MDP, ELDP):

- 1) Personal Growth: Willingness to learn and enhance knowledge, skill level, attitudes, and behavior around the leadership concepts learned.
- 2) On-the Job Application: Applied programmatic concepts learned in daily practice.
- 3) Process Improvement: Improved processes, relationships and overall daily interactions through on-the job application of programmatic concepts learned.

SIGNATURES FOR ANNUAL PERFORMANCE APPRAISAL

<u>Next Level Supervisor:</u>		<u>Date:</u>	
<u>Supervisor:</u>		<u>Date:</u>	
<u>Employee Acknowledgement:</u> I understand that my signature below indicates that I have received this annual performance appraisal, that my signature does not necessarily imply my agreement with the ratings given or the comments included, and that if I choose, I may write a response to include with this appraisal document.		(Check here if you are attaching comments.)	
<u>Employee:</u>		<u>Date:</u>	

cc: Personnel File