

**THE UNIVERSITY OF SCRANTON
PROFESSIONAL STAFF APPRAISAL FORM - CHECKLIST**

NAME:		SSN:
TITLE:		DEPARTMENT:
DIVISION:		
APPRAISAL PERIOD	FROM:	TO:

Section I: Accomplishments during the Appraisal Period

1. List each significant accomplishment during the current appraisal period. Refer to goals and developmental objectives agreed upon from previous performance evaluation. Be specific (numbers, dollars, percentages, and completion dates) where possible. Supervisory disagreements must be elaborated on in comments section.

GOALS & DEVELOPMENTAL OBJECTIVES

RESULTS

GOAL: OBJECTIVES:	
GOAL: OBJECTIVES:	
GOAL: OBJECTIVES:	
GOAL: OBJECTIVES:	

2. **Contributions to the Institutional Statement of Mission: Explain briefly how you have contributed to the goals identified in the Statement of Mission of The University of Scranton.**

Section II: Job Related Performance Factors

(To be completed by evaluator & discussed with employee). **Please check all that apply. Use comments section to clarify & cite examples as appropriate.**

JOB KNOWLEDGE: Knowledge of the relevant theories, policies, procedures or resources required to perform job.

- Demonstrates ability to share expertise with others and/or is cross-trained in other unit functions.
- Frequently demonstrates knowledge by making recommendations that improve operations.
- Is often considered highly knowledgeable in the area and is used as a resource person.
- Consistently makes decisions on exceptional cases in a logical and consistent manner.
- Usually knows sources of information to get answers to questions.
- Does not familiarize oneself with changes in rules or procedures.
- Often fails to retain information or solutions to problems.
- Fails to keep informed of relevant updates in their area and has minimal understanding of job.

COMMENTS:

INTERPERSONAL SKILLS/RELATIONS: Dealing with Clientele, co-workers, supervisors and others. Responding to suggestions, instructions or feedback from supervisors.

- Acts as University ambassador with students and parents
- Frequently cooperates and collaborates with others in resolving problems.
- Generally interrupts own work, when appropriate, to answer a question.
- Uses tact and diplomacy in handling sensitive situations or complaints, respects rules of confidentiality.
- Gains cooperation and respect from others and works well as part of a team.
- Remains tactful and polite when dealing with people including students.
- Perceives and reacts sensitively to the needs and viewpoints of others.
- Frequently becomes impatient or annoyed when someone does not "catch-on" to instructions immediately.
- Responds negatively to constructive suggestions about work performance and attitude on the job.
- Fails to deal tactfully with people.

COMMENTS:

TIME MANAGEMENT Ability to organize and carry out duties. Includes setting priorities,

following instructions, meeting deadlines and developing agenda of discussion issues.
Commitment of time to accomplish goals and objectives. Reliability, dependability and availability to meet job requirements.

- _____ Commits time and energy necessary to meet job requirements, both routine and exceptional.
- _____ Prioritizes and handles multiple assignments with minimal guidance.
- _____ Prioritizes and handles multiple assignments with minimal guidance.
- _____ Effectively balances special projects along with routine work.
- _____ Generally responds promptly to requests for assistance.
- _____ Frequently gets bogged down in details and fails to accomplish important objectives.
- _____ Fails to complete assigned work unless constantly reminded.
- _____ Frequently concentrates solely on on-going work; neglects long-term, special assignments.
- _____ Fails to prioritize work effectively.

COMMENTS:

WORK MOTIVATION: Initiative. Level of interest in the job, work effort and taking action to achieve team goals.

- _____ Makes effective transitions to new assignments.
- _____ Generally anticipates and tries to solve problems before seeking assistance.
- _____ Originates action rather than simply responding to events.
- _____ Frequently seeks additional assignments and/or responsibilities.
- _____ Occasionally fails to take action to correct performance deficiencies
- _____ Frequently wastes time to keep at a standard level of performance.
- _____ Is unwilling to take on projects that are time-consuming but that will result in long-term gains.

COMMENTS:

VERBAL COMMUNICATION: Ability to convey information, listen to and understand verbal communication in meetings interviews presentation and one-to-one conversations.

- _____ Is persistent and persuasive, when appropriate, without offending or irritating others.
- _____ States the problem directly and specifically, providing background and reasons why an action was taken.
- _____ Ensures understanding with listener before proceeding with discussion or explanation.
- _____ Speaks to non-office personnel in understandable terms without using "in-house" language.
- _____ Offers weak arguments when attempting to persuade others.
- _____ Frequently digresses from essential points, leading to excessively long conversations.
- _____ Is generally misleading or inaccurate when answering questions.
- _____ Gets essential facts confused when something is explained.

COMMENTS:

WRITTEN COMMUNICATION: Conveying information and instructions in writing. Maintaining complete and accurate records, including required documentation.

- _____ Documents actions taken in a concise, orderly format.
- _____ Prepares excellent written reports of the highlights of conferences, meetings, etc.
- _____ Conveys exact meaning in a few words as possible.
- _____ Composes reports, etc., that are clear, accurate and well-organized in a timely fashion.
- _____ Generally fails to provide complete information in correspondence resulting in additional letters or telephone calls.
- _____ Frequently prepares correspondence that is often misinterpreted by readers.
- _____ Lacks clarity and organization in technical compositions or correspondence

COMMENTS:

PROBLEM ANALYSIS/DECISION MAKING: Applying rules and standards to work. Assessing a situation and formulating decisions based upon ethical principles, professional guidelines and sound decision-making process.

- _____ Follows decision-making processes that seek input and assistance from those who will be affected by and those who will implement changes to policies, programs, or procedures.
- _____ Gathers and analyzes data in a systematic manner to help formulate recommendations and modify programs and procedures.
- _____ Frequently makes logical decisions in the absence of supervisors when unanticipated situations arise which warrant immediate action.
- _____ Sometimes fails to use common sense to augment the interpretation of literal instructions.
- _____ Occasionally fails to act in situations not specified in policies, directions, or procedures.
- _____ Makes inconsistent or inappropriate interpretations of policies or rules.

COMMENTS:

PROFESSIONAL DEVELOPMENT: Demonstrating a desire to professionally develop by seeking opportunities that strengthen skills and improve knowledge.

- _____ Seeks out assignments that will provide opportunities to develop existing skills or to learn new skills.
- _____ Is actively involved in community activities.
- _____ Regularly volunteers to serve on university committees.
- _____ Frequently reads professional publications and keeps up with new trends, shares information with staff.
- _____ Is generally unwilling to attend professional conferences or meetings.
- _____ Does not take initiative to suggest training opportunities.
- _____ Does not develop new skills or competencies in order to improve performance.

COMMENTS:

FOR EMPLOYEES WHO HAVE SUPERVISORY RESPONSIBILITIES

MANAGING WORK: Planning and organizing personnel and/or budget resources to meet department goals. Monitoring activities of subordinates and taking appropriate action at the proper time. Delegating responsibility and authority to other team members.

- _____ Maintains a complete schedule and checklist to follow progress of special projects or activities.
- _____ Plans staffing to ensure that positions are filled with competent people.
- _____ Frequently recommends changes to that several operations can be performed more efficiently.
- _____ Estimates time required for each assignment, its relative importance, and who is best equipped to perform it.
- _____ Generally fails to follow-up on projects resulting in their late completion.
- _____ Does not consider or suggest alternative work procedures even when asked to do so.
- _____ Generally fails to distribute workload equitably.
- _____ Fails to establish or follow sensible work priorities when faced with heavy and conflicting demands.

COMMENTS:

MANAGING AND DEVELOPING STAFF: Obtaining cooperation of subordinates, resolving interpersonal problems and conflicts. Considering needs, aspirations and feelings of others. Initiating developmental activities to increase the skills and competencies of staff members. Promoting cultural diversity

- _____ Uses performance evaluation as a developmental tool.
- _____ Promotes working environments and relationships that encourage and support cultural diversity.
- _____ Consistently compliments and gives recognition for those special tasks that an employee did well.
- _____ Establishes detailed plans for training a new employee.
- _____ Listens carefully to both sides of the story before rendering a decision.
- _____ Generally offers encouragement to employees who think their jobs are unimportant. Points out the value of their skills and the impact of the job on others.
- _____ Fails to ask subordinates for their opinions before making decisions that affect them.
- _____ Demonstrates favoritism among subordinates.
- _____ Fails to explain why decisions were made..

COMMENTS:

LEADERSHIP: Inspiring others to see and contribute to the achievement of the organizational vision.

- _____ Inspires others to work in the Ignatian spirit.
- _____ Frequently acts as a catalyst to bring about positive change and resolve problems.
- _____ Sets example regarding integrity, thoughtfulness, personal presentation and conduct.
- _____ Advocates for staff
- _____ Does not foster an environment that encourages the free exchange of ideas/issues.
- _____ Occasionally puts self-interest before teamwork.
- _____ Fails to confront difficult situations.

COMMENTS:

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Developmental Goals - Next Appraisal Period

Jointly set goals for development in specific areas. Choose those areas where development can result in either increased effectiveness in the current position or better preparation for future responsibilities. When appropriate, plans should be tied to specific projects.

GOAL: OBJECTIVES:
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Section III: Overall Evaluation (Please check one)

- This employee's performance meets or exceeds expectations
- This employee's performance warrants a corrective action plan, developed with the assistance of Human Resources, please check this box.

Section IV: Comments and Signatures

ADDITIONAL COMMENTS BY APPRAISER:
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SIGNATURE:	DATE:
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COMMENTS BY INDIVIDUAL BEING APPRAISED:
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SIGNATURE:	DATE:
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MERIT REQUEST:

SIGNATURE:	DATE:
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REVIEWED BY DIVISIONAL VICE PRESIDENT

SIGNATURE:	DATE:
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