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State College



SUPERVISOR'S PERFORMANCE REVIEW Handbook

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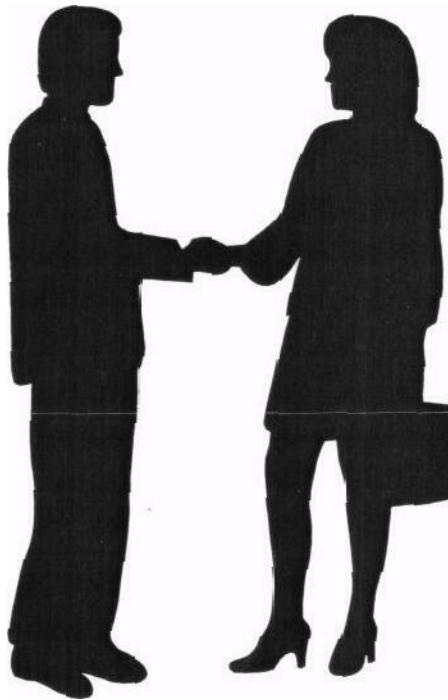
INTRODUCTION

LSSC PERFORMANCE REVIEW SYSTEM

LSSC's strategic plan goals speak to the necessity for effective human resource management. The College is successful to the degree that its employees are successful and motivated performers. Consequently, appraising job performance effectively and regularly for faculty and staff is a leadership priority to ensure that LSSC is successful in meeting its vision, mission and specific goals.

This document is intended to provide guidelines and supporting information for supervisors and their employees to be successful in completing the performance review process. Successful performance reviews are those that are productive, timely, meaningful, factual, ethical, legal and directly linked to LSSC's purpose and goals.

Questions regarding the information contained in this document or the need for any assistance, may be directed to Human Resources.



PERFORMANCE REVIEW AS A LEADERSHIP OPPORTUNITY

For a supervisor, effective and meaningful performance reviews take considerable thought, preparation and time. When done properly the performance review process is one of the best opportunities for supervisors to display leadership skills in assisting employees to reach their full work potential. For a supervisor, the manner in which one assesses an employee's performance can make a difference in the employee's overall job performance, motivation level, morale and career development. During the performance review process the supervisor has the opportunity not only to provide valuable information about an employee's past performance, but also to work with the employee in planning for his/her future at the college. A supervisor can recognize an employee's accomplishments, give candid feedback about areas that need improvement and establish performance improvement plans. By taking a leadership role in the review process, supervisors can make a significant contribution to the College by coaching faculty and staff to maintain satisfactory levels of performance, or more importantly, strive to achieve higher levels of work performance.

THE LEGAL REQUIREMENTS OF PERFORMANCE REVIEWS

To avoid costly legal ramifications, performance reviews must be administered accurately and fairly. To accomplish this, the supervisor as performance evaluator must:

- Have actual knowledge of the employee's performance, which must be acquired over a reasonable amount of time, and
- Explain the ratings and standards to the employee.
- Objectively and specifically assess the performance of the employee, using specific examples, avoiding generalizations. Point out specifically in which areas of performance the employee did well and where he/she needs to improve.
- Focus on job performance and not the person; avoid letting personal friendship, dislike, or any personal bias against an employee affect the assessment of performance.
- Be clear, direct, and honest; do not be afraid to give poor ratings when they can be substantiated with specific examples.
- Be sure the performance review is free from bias of race, color, sex, religion, nationality, age, and/or disability, or any other personal bias.
- Not let the rating of an employee's performance in one area spill over into another; judge each area separately.
- Not prepare the performance review as a last minute attempt to justify a termination if there is little or no earlier documentation of performance problems. Throughout the year the supervisor/evaluator needs to appropriately document incidences of poor performance, absenteeism, etc., and place copies of this documentation in the employee's personnel file. The College employs a progressive discipline process as

detailed in Procedure 5-25 which can be found in this document's Appendix section, or from the College's web page.

The necessity of conducting fair, accurate, timely, etc. performance reviews cannot be overstated. Performance reviews, which do not follow the above guidelines, serve neither the employee nor the college and could create a legal liability for the college with the EEOC, or in a court of law, etc.

SPECIFIC PURPOSES FOR PERFORMANCE REVIEWS

A carefully planned performance review system serves many purposes that benefit both the college and the employee. Specifically, the performance review should:

- Serve as an instrument for the supervisor to give feedback to the employee on work performance.
- Serve as an instrument to allow the employee to evaluate his/her own work performance.
- Serve as an aid in improving communication regarding work performance and expectations between the employee and the supervisor.
- Serve as an instrument for the supervisor and employee to establish specific goals and goals.
- Serve as a motivation for improved employee performance.
- Serve as an aid in identifying professional development/training needs.
- Serve as a source of information for applicable administrative decisions, such as promotion and continued employment.
- Serve as a source of documentation impacting legal decisions involving external agencies, such as the EEOC, court, etc.

Because the impact of any one of these listed purposes can have a major effect on the work performance and morale of employees, as well as significant liability for the college, the necessity of conducting meaningful, effective and legal performance reviews cannot be overstated.

PERFORMANCE REVIEW AS AN ON-GOING PROCESS

Although this information focuses on the "formal" performance review, the actual process of appraising performance should be part of day-to-day communication between the supervisor and the employee. The College advocates that supervisors practice the One Minute Manager™ (OMM) principles by Dr. Ken Blanchard. The formal performance review should be a culmination of many documented OMM cycles. See page 11, Performance Review Process Diagram,

Long before any formal performance review takes place, the supervisor and the employee should discuss job duties and/or performance goals as well as their associated performance standards/expectations. On an on-going basis, the supervisor and the employee should discuss the employee's performance against these established job duties/goals and expectations/standards. Throughout the year, the supervisor should point out specifically in which areas the employee is performing well and in which areas the employee needs to improve.

Reinforcing and recognizing good job performance makes employees feel good about their work accomplishments and enhances their motivation. It is also important for employees to receive on-going feedback about performance areas needing improvement so that employees are aware of performance problems (deficiencies) and can work toward correcting them. Lastly, by providing on-going feedback, performance "surprises" for the employee at the formal performance review should not occur. By eliminating or reducing surprises employees' self respect will be maintained further reducing employee low morale, grievances and even resignations.

Overview of LSSC Performance Review Forms & Processes

The current performance review process and associated forms have been designed through appropriate faculty and staff committees, and endorsed by the President's Cabinet. Because all College positions are not alike, specific performance review processes and forms have been established to best meet the needs of the following employee groups:

- Faculty (Instruction and Non-Instructional),
- Administrator,
- Managerial and Professional Technical, and
- Professional Administrative, Professional Crafts & Trades employees.

Performance reviews or evaluations are specifically governed by LSSC Rule 5.16 and LSSC Procedure 5-05.

A few common elements exist across all performance review forms and processes, but there are significant differences also tailored to best meet the needs of each employee group.

Common to All Performance Reviews

All performance reviews require employees to self-evaluate and submit such to their respective supervisors. Supervisors are to consider the employee's self-evaluation information. Besides being respectful to the employee, this action will enable the development of a more accurate, collaborative and finalized performance review. Because of the College's commitment to Service Excellence (SE) the reviews contain a section on the SE standards with a rubric to assist in assigning the appropriate performance rating.

Important: if one or more unsatisfactory ratings have been made for any Performance Objective/Duty and/or Job Factor, then "Unsatisfactory" is to be marked as the Overall Performance Rating. Also, a development plan with a timeline must be completed to address how the unsatisfactory rating(s) will be improved to a satisfactory level. Consult with Human Resources Executive Director.

Performance reviews are signed-off by the next higher level above the supervisor/evaluator BEFORE that individual conducts the formal performance review discussion with the respective employee.

Significant Differences per Each Employee Group Performance Review

Faculty Performance Reviews

Faculty performance reviews fall into two formats: Instructional and Non-Instructional for Librarians. Besides these formats both covering critical job duties and responsibilities, both reviews also contain a major section assessing the employee's progress toward the

accomplishment of specific criteria for advancement in compliance with the Faculty Rank and Promotion (FR&P) guidelines. Instructional faculty performance reviews have an overall rating of satisfactory or unsatisfactory as a composite rating for the sections in the review.

Non-Instructional faculty performance reviews for Librarians use a similar evaluation rating system as the instructional faculty review, but the review's sections are tailored specifically to other librarian skills.

Managerial, Professional Technical, Professional Administrative, and Professional Crafts & Trades Performance Reviews

Although Managerial, Technical, Professional Administrative and Craft and Trades performance review forms do not have a Job Factors section overall performance rating established, these forms do contain an Overall Performance Rating as a composite rating for the entire performance review.

Administrator Performance Reviews

The Administrator Performance Review form must show the administrative employee's key goals for in the current fiscal year. These goals support the College's Annual Plan Initiatives and/or the employee's respective division goals. The Administrator Performance Review does contain an overall or final performance rating. The overall rating is necessary to support the strategic intent to move toward "pay for performance."

Also fundamentally different from the other employee group reviews is that Administrators are reviewed on their yearly accomplishment of specific business goals or goals. Importantly, the Administrative Performance review process includes a required informal six (6) month interim performance review and then the final twelve (12) month formal performance review. This process permits critical communication, calibration and adaptation of goals by the supervisor and employee. Therefore the employee's goals/goals are kept current and re-assessed to ensure such remain vital to the College's business annual plan.

The Performance Review Cycle and Processes for Employee Groups

Although open communication between a supervisor and an employee about performance should be on-going, supervisors are required, on an annual basis to complete written performance reviews on all full-time and regular part-time employees who report to them. Please see the "Performance Review Process Diagram" on page 10 which illustrates the connection of regular ongoing performance communication to the formal annual review.

Adjunct faculty employees (who are part-time Instructional Faculty members) receive a first year formal performance review and then subsequently receive one every three years, unless performance dictates otherwise as determined by the Dean. As stated earlier, all performance reviews must be signed-off by the next higher level above the originating evaluator/supervisor BEFORE the supervisor conducts the formal performance review discussion with the employee.

Human Resources will send to supervisors reminder email messages when their respective employee performance reviews are to be completed and submitted. During the last week of any given month a reminder will be sent to all respective supervisors informing them of their employees who will need a performance review in the following month.

Faculty (Instructional and Non-Instructional) Performance Review Process

Instructional faculty performance reviews are completed by the department chairs and deans during January and February of each year. The review form contains sections covering instructional observation, instructional load, responsibilities or general duties, Faculty Rank & Promotion progress, and a professional development plan.

Non-Instructional or Librarian performance reviews are completed by the Director of Library Services during January and February of each year. The review form is very similar to the instructional faculty performance review form; however, it contains some specific customization to the librarian profession.

Managerial, Professional Technical, Professional Administrative, and Professional Crafts & Trades Performance Review Process

These annual performance reviews are completed at the end of the month specific to each employee's service anniversary month. For example if an employee in this employee category began his/her College employment in the month of August, then this employee's annual performance review would need to be completed and provided in August.

Supervisors may consult with Human Resources to ascertain the appropriate month when their employees' performance reviews must be completed.

Administrator Performance Review Process

The Administrator Performance Review process aligns with the fiscal year, July through June. The performance process begins in July with the development of performance goals/objectives linked to the respective division goals which are linked to the initiatives of the College's Annual Plan. In January an informal mid-year performance review is done to ensure that the administrator's goals/objectives are still current and progress is being accomplished. At the end of the June and into early July the detailed final formal performance review for the fiscal year is completed. At that time discussion occurs typically between the administrator and supervisor about what new goals or objectives will be needed for the new fiscal year.

Location and Retention of Performance Review Forms

All performance review forms are official LSSC electronic forms and are available on the on the College's forms webpage or on the HR webpage. Also, samples of the forms are located in the Appendix of this document.

All original and signed employee performance review forms must be filed in HR. Copies may be kept by the employee and supervisor. Board Rule 5.16 and Procedure 5-05 cover pertinent details about submission and records retention of completed LSSC employee performance reviews.

Overall Steps for Completing Performance Reviews

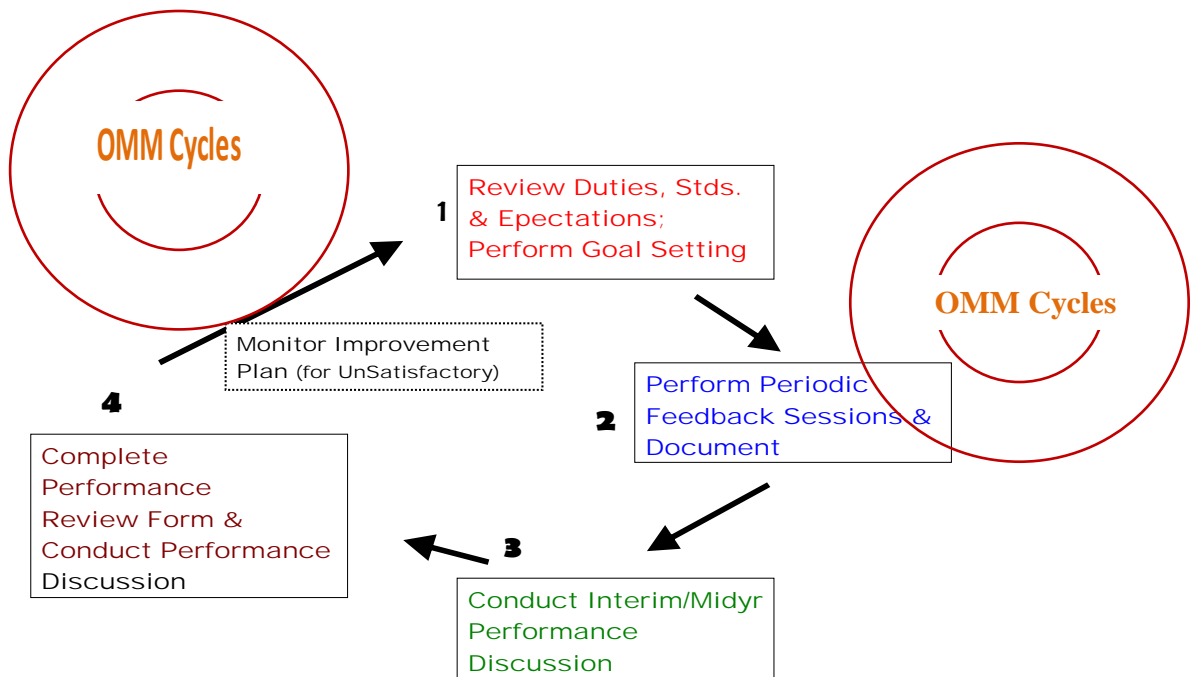
Five major steps exist for completing an employee's formal performance review. These five steps are:

1. Prepare and Review Documents
2. Organize and Prepare Performance Review Form
3. Evaluate and Rate performance of Job Duties and/or Goals
4. Complete Performance Review Form and Process
5. Finalize Performance Review Form and Conduct the Review with Employee

For more specific information about each step, please see page 18, "5 Steps to Complete the Formal Performance Review."

Also see pages 20-23 for additional guidelines and tips for conducting performance reviews. Those pages also cover pitfalls to avoid when conducting a performance review.

Performance Review Process Diagram



OMM = One Minute Manager™ by Dr. Ken Blanchard

Job Expectations and Standards

For employees to be successful in their jobs supervisors need to be certain employees understand fully the expectations and/or standards assigned to their work duties or responsibilities. Those expectations or standards directly link to the level of work accomplishment that enables the work unit or department to be successful. Successful work units, departments and divisions thereby ensure the College fulfills its vision, mission and strategic plan.

Job expectations or standards are also used not only in praising and coaching employee's performance behavior through routine use of the One Minute Manager™ principles but also in completing the employee's formal performance review process. This process ensures consistent performance communication thereby avoiding surprises at the formal performance review.

Written job expectations and standards must be provided to employees. These expectations and standards are established 1) for each specific job duty stated in the job description, and 2) for the Job Factors/Competencies connected to a position as defined in the appropriate performance review form for a position.

The College has a document entitled, "LSSC Performance Review Overarching Rating Indicators". This document is a guide to assist supervisors in establishing standards to performance ratings in a consistent manner as possible across all College positions. See Appendix, "LSSC Performance Review Overarching Rating Indicators".

All College jobs or positions have formal job descriptions which describe amongst other items the major duties or responsibilities of that job. These job duties are assigned percentages which equate to the amount of time and work they comprise of the total work for that job. Major duties can be identified easily because they are assigned the highest percentages. Technically all duties of the job description should have assigned expectations and standards. At the very least, however, those duties which when added together comprise 75% or greater of the job, must have expectations and standards assigned. Written job expectations and standards are in effect an "addendum" to an employee's job description.

Sound job duty expectations and standards:

- are important for effective on the job training, especially for new employees;
- can motivate employees to achieve higher levels of performance; and,
- assist the supervisor in determining performance gaps and implementing the most appropriate corrective actions to close those gaps.

For a sample of a specific position's job duties' standards, see Appendix, "Sample Job Duty Standards/Rubric for Program Staff Assistant – Athletics".

Creating/Using Job Expectations and Standards

Performance standards, or more specifically rubrics, already exist for "Job Factors/Competencies" which are assigned to specific employee groups: Administrator, Managerial & Technical and Professional: Administrative, Craft & Trades. See the Appendix,

“Job Factors/Competencies” Rubrics, for these documents.

However, **job duty** expectations and standards may or may not already exist for each specific College position. Supervisors have been developing them for some time and a repository exists. Before embarking on building or redefining standards, supervisors should first check with their managers and/or with HR. If none exist then the supervisor is responsible for creating and implementing them.

Because developing and establishing effective job expectations and standards requires training and some significant work, this handbook does not provide that training. To obtain that training, supervisors need to take Lesson Three (3) “Using Performance Management System” of the LSSC Leadership Program, a web based hybrid course. After completing lesson three the supervisor should seek specific assistance (coaching) from HR.

For access to the “Using Performance Management System” training, contact the Professional Development Center or HR.

HOW TO GIVE PERFORMANCE FEEDBACK

Performance feedback not only helps employees do their work more effectively, but it also improves communication between the supervisor and the employee. Supervisors, subordinates, and even coworkers need to provide feedback to each other. When specific and accurate feedback information is provided in a constructive way, both employees and supervisors can not only ensure that right things be done right, but also where necessary performance improvements can be made.

All employees who are performing competently should receive praise and encouragement. Those who are not performing at the expected level should be informed of the performance gap, as identified by the performance not meeting the standard, and then "coached" on how to improve. This action constitutes constructive feedback. Apprising employees of their accomplishing performance to the satisfactory standard or higher standard helps either to strengthen their motivation to achieve a higher performance level, or to reinforce them to continue in performing at the satisfactory level. Communicating with employees in a positive manner when they need to improve their performance will help prevent chronic work problems and minimize surprises during the annual performance review process. It is important to remember that both positive and corrective constructive feedback should be given as close as possible in time to when the relevant performance occurs.

Positive Feedback

Positive feedback is defined as providing feedback to someone who has done something well and deserves praise for his/her efforts. In providing positive feedback, the following general rules should be applied:

- Respect the individual's privacy by choosing a time and place to speak without interruptions or being overheard by others. However, there may be occasions when it is appropriate to praise an employee publicly.
- Clearly describe what the individual did to deserve praise.
- Express personal appreciation and explain how the performance helps in the achievement of the employee's duties and responsibilities and overall accomplishments of the department.
- Ask if there are any job-related problems that the individual may need help with. Employees particularly appreciate it when their supervisors care enough to ask how they might help with any work difficulties.
- If necessary, the supervisor should schedule a follow-up meeting to see if the employee's concerns have been addressed.

Corrective Constructive Feedback

Corrective constructive feedback is defined as providing feedback to someone who has not performed to the expected standard level and who then needs to employ specific corrective action to meet the expected level of performance. Constructive corrective feedback needs to be provided in a way that will continue to motivate the individual. By exercising the following rules

the corrective feedback can be provide constructively and motivation secured.

- Respect the individual's privacy by choosing a time and place to speak without interruptions or being overhead by others. Privacy is especially important when giving constructive feedback.
- State clearly and specifically the performance gap: the performance currently happening that does not meet the performance expectation or standard needed.
- Focus on the performance gap, not the individual's character. Avoid personalizing feedback, e.g., "Chris, the billing in the unit is two weeks behind; I'd appreciate your input concerning how to bring it up to date," NOT "Chris, you are slowing up the billing!"
- Identify exactly how the performance gap problem (deficiency) causes difficulty for the work unit and cannot continue.
- Ask for the individual's help in resolving the performance gap or problem by asking for her/his ideas; and discuss sincerely those ideas he/she offers for its solution.
- Reach agreement on specific actions that all involved will need to take to solve the problem. Confirm this agreement by restating it and by assigning a specific time frame or deadline to complete action.
- Schedule a follow-up meeting to examine the effectiveness of these actions.
- Never threaten the individual with ambiguous consequences if the behavior doesn't change, e.g., "Shape up or you'll be very sorry." The purpose is to motivate a change in behavior for positive reasons. Stronger steps can and should be taken through the disciplinary process if behavior does not change.
- Never use feedback as a way to "put a person down" or "in their place," to embarrass the individual in front of others, or to relieve anger.
- Attempt to leave the person motivated to perform better. If he/she is not motivated to improve, then the feedback was non-productive.
- If the performance does not improve, the supervisor should document the performance gap formally and perform coaching again. Note: continued failure for the employee to meet the performance expectation/standard could result in either a formal performance review marked as "Needs Improvement" or "Unsatisfactory" warranting possible probation based upon the specific situation. Please refer to LSSC Procedure 5-25 and consult with HR about how the situation should be handled.

WHEN & HOW TO DOCUMENT PERFORMANCE EFFECTIVELY & EFFICIENTLY

Performance documentation is one or more written behavioral examples used to substantiate a performance rating.

Sound behavioral examples are:

- Specific
- Relative to the performance category, dimension or performance goal
- State or infer qualitative or quantitative measurement
- Dated

Poor Example: Duty/Category: Handling/Servicing Incoming Phone Calls

“A caller was thankful for your continued assistance”
(Rating: Exceeds Expectations)

Sound Example: Duty/Category: Handling/Servicing Incoming Phone Calls

“On 3/10/05 Ms. Bartell, County Superintendent, acknowledged your persistence in finding and supplying her with the accurate information about the next EPI Planning Meeting” when Charlotte was not available. (Rating: Exceeds Expectations)

REMINDERS ABOUT DOCUMENTATION

- COLLECT DOCUMENTATION (examples) THAT SUPPORT EXEMPLARY, EXCEEDS EXPECTATIONS OR UNSATISFACTORY PERFORMANCE RATINGS
 - These should typify the agreed-upon Performance Indicators
 - Do NOT spend time documenting examples of “Meets Expectations”
- As stated above, collect examples of work performance throughout the performance year from:
 - Customer/clients/employees such as recommendations, verbal accolades, written letters of commendation
 - Work samples of errors, below expectations
 - Work samples of above and beyond what was expected

Note: Talk to a few key people who routinely interface with the employee and inquire about his/her performance in specific key areas – especially ones that you may not witness.

- Remember a behavioral example or documentation may pertain to more than one duty/goal/objective. Any that connect or overlap to more than one duty/goal are very valuable as they then “paint a broader picture” of the employee's performance.

- Collect and use documentation (per all the above) relative to at least the top duties/goals that reflect 75% of the job description. **Note: any duty or goal marked as unsatisfactory must have several examples of supporting documentation.** Consult with one's manager and HR.

Here's a mnemonic as a quick review about the key items to practice when delivering performance reviews.

OSCAR

Objective Based (specific and not subjective thru solid examples; based upon communicated performance expectations and standards; takes into account incumbent's self-review)

Surprises Prevented (periodic mini-reviews or feedback sessions provided prior to formal review)

Circumstances summarized (examples, documentation provided, obstacles discussed and counter actions created, improvement areas & development plans co-created)

Accomplishments Highlighted (talents validated, how obstacles were dealt with and overcome)

Re-Initiate Your Commitment to support/partner with employee (sincerely thank them for their contributions to the success of your team/department & College; Re-Initiate the Performance Process by establishing a follow-up discussion about job changes, new goals and expectations, etc.)

5 Steps to Complete the Formal Performance Review

| STEP | ACTION |
|------|--|
| 1 | Prepare and Review: <ul style="list-style-type: none"> Employee's Job Description Employee's Self Evaluation Performance Expectations/Standards/Rubric Appropriate Performance Review (per the employee's job category: Administrator, Managerial & Technical, Professional Administrative and Crafts & Trades) |
| 2 | Organize Data and Performance Review Form: <ul style="list-style-type: none"> Place each job duty or objective into the appropriate performance review form (per the employee's job category). Arrange documentation notes and Link to each appropriate duty or objective and job factors item. |
| 3 | Evaluate and Rate Performance: <ul style="list-style-type: none"> Examine each duty or objective and job factors item. Carefully consider and use appropriately any of the employee's examples or documentation from <u>her/his submitted performance self-evaluation</u>. Select the appropriate rating using the standards/rubric for the job duties and job factors. Mark on the form the selected ratings and supply the supporting documentation for ratings of E, EE, Needs Improvement and Unsatisfactory. (Note: documentation is not necessary for Meets or Satisfactory.) |
| 4 | Complete Performance Review Form and Performance Review Process: <ul style="list-style-type: none"> Create a draft Improvement Plan (if Needs Improvement or Unsatisfactory ratings were indicated) if Improvement Plan was not necessary, create a draft Development Plan to indicate further strengthening of talents/competencies Assess how different your view of the performance review is from the employee's self-evaluation. If significantly different, elect to have a pre-review discussion to clarify the differences for sharpening the performance review |
| 5 | Finalize Performance Form and Conduct formal Performance Review <ul style="list-style-type: none"> Apply signature and obtain next level's signature Rehearse privately the delivery of the performance review to strengthen your confidence; prepare for possible employee questions or rebuttals Conduct the review with the employee in a "joint discussion" format. (Involve the employee by asking questions or seeking input into what improvement would look like to her/him, etc.) Have employee sign performance review which indicates that she/he has received the review. (Note: the employee is not signing that she/he agrees or not with any or all of the review.) Send the original, finally completed performance review form to Human Resources for records management. |

GENERAL GUIDELINES FOR COMPLETING AND CONDUCTING THE PERFORMANCE REVIEW DISCUSSION

The following general guidelines will help you to conduct performance reviews that are meaningful, effective, and legal:

- Prepare for and schedule the performance review in advance. Let the employee know well in advance when the review will take place so that he/she also will have adequate time to prepare. Emphasize to the employee that you value his/her input and welcome any suggestions that the employee may have for you to enhance his/her performance or to remove any barriers that impact the employee's performance.
- Throughout the year be sure to review with the employee his/her job duties and responsibilities, as outlined in the employee's job description, and the performance objectives that you and the employee established. These job duties/responsibilities and objectives form the basis of the performance review.
- Before filling out the performance appraisal form, review the employee's submitted self-evaluation, review your notes that you kept during the year regarding the employee's performance. This review will assist you in giving specific examples. Note any discrepancies between your "view" and the employee's.
- Allow sufficient time to complete the form. Strive for honesty and accuracy. If you have any doubts about any information that should be included (or not included) on the performance review form, or if you have any reservations about ratings or any other concerns, do not hesitate to consult your next line supervisor or the Office of Human Resources.
- Find a quiet, private place for the performance review meeting. If at all possible, don't cancel the meeting because of other duties. Avoid interruptions. Making the performance review meeting a priority is an important message to send to the employee.
- Create a supportive environment to put employees at ease. Many employees have grave apprehensions about the performance review process. Strive to put the employee at ease by "warming up" the environment. For example, give the employee a comfortable chair and offer a cup of coffee or other refreshment. Sit in a more casual relationship to the employee and not behind your desk. The desk represents authority and can be a barrier to communication. Reassure the employee that you view performance review as a positive process that encourages constructive feedback about job performance and increases greater job understanding.
- Watch your body language and be aware of its impact on others: tapping fingers on a desk, looking at your watch, flipping through the pages of a book, or fiddling with a coffee cup distracts the conversation and impairs the communication process. This type of behavior sends the message that you are impatient and want to move to other things.
- Make the performance review meeting a process of two-way communication. Express an interest in the employee's self-evaluation and encourage the employee to share perceptions of his/her job performance. Listen to the employee, even if his/her perceptions are different

from yours. A good rule of thumb during the performance review meeting is to listen more than you talk. A performance review meeting should not be a "lecture." Be clear, direct, and honest in your communication. Don't be afraid to alter your opinion about an employee's job performance based on additional, previously unknown information that the employee may share with you. Also, if you don't agree with the employee, don't be afraid to keep your rating the same.

- Focus on job performance, not on the employee. Even if the employee is not performing well, make it very clear that you are evaluating job performance behaviors and not the person. One sure way to create difficulties in the review is for the employee to feel attacked personally.
- Support the performance review with specific examples. Filling out the comment section with specific examples is critical to conducting a meaningful, effective and legal performance review. Documentation is required for all ratings of exemplary, exceeds expectations and unsatisfactory. However, the college strongly encourages documentation for all ratings because such gives "clarity and meaning" to the ratings.
- Give both positive and corrective feedback. Focusing on the performance of each job duty and not the person, do not hesitate to acknowledge good performance and to give constructive criticism of performance that needs improvement. For more information, refer to the section on How to Give Constructive Feedback.
- If the employee is reticent to talk during the performance review interview, use open-ended questions, which require more than a yes or no answer. Examples of open-ended questions are: "Why do you think we have departmental difficulties in administering the program?" or "What suggestions do you have to improve our reporting system?" Asking questions not only gets the employee talking, but it also shows that you value the employee's ideas.
- Sometimes during the performance review process, an employee may identify a personal problem that negatively impacts his/her work performance. If this is the case, inform the employee that the college has a confidential Employee Assistance Program (EAP) that allows up to eight free counseling sessions each year for a variety of problem areas, including marital, grief, financial, alcohol, etc. Give the employee the phone number of the EAP and a handout (available in the Office of Human Resources). Assure the employee that the program is confidential. Offer support, but do not try to diagnose or solve the problem. If you suspect a personal problem, but the employee has not identified one to you, do not accuse or make an assumption concerning the employee. Instead, focus on the performance and give the employee an opportunity to share his/her reason(s) for the performance problem. If the employee does not identify a personal problem, you should not either. Rather, ask the employee what he/she plans to do to improve performance and what you as the supervisor can do to help.
- At the close of the performance review meeting, sum up what was discussed during the meeting. Ask the employee if he/she has any questions or concerns.
- For areas that need improvement, be sure to establish with the employee an agreed-upon performance improvement plan for the following year. Write down this improvement plan on the performance review form. It is imperative that an employee knows specifically what he/she needs to do to improve performance and plan a timeframe for follow up. Performance

improvement plans are critical to conducting meaningful, effective and legal performance reviews.

- Acknowledge the professional development that the employee undertook during the year and agree upon general professional development/training activities for the upcoming year.
- Discuss with the employee performance objectives for the upcoming year during the review process. It is critical that you and the employee agree upon the goals and objectives that will be evaluated in the employee's next performance review. Refer to the section on Setting Performance Objectives.
- If the communication deteriorates during the performance review interview and you feel that to continuing the meeting would be unproductive, do not hesitate to terminate the meeting and reschedule another one. Explain to the employee that for a constructive and productive meeting take place, both of you should regroup and meet again very soon.
- If an employee states that he/she does not want to sign the performance review because of disagreement with some or all of it, emphasize to the employee that a signature only means that the review occurred. Encourage the employee to write his/her comments regarding the performance review within fourteen (14) working days. These comments will be filed with the performance review form in the employee's personnel file.

PROFESSIONAL DEVELOPMENT PLANS

To the fullest extent possible, the college supports the professional development of all employees. The performance review process is the natural time for the employee to focus on the professional growth. The performance review process provides supervisors and employees with the opportunity to assess what professional development activities were completed during the year and to discuss plans for the next performance review cycle. Jointly, the employee and supervisor need to identify professional development activities that will enhance the employee's current position and may further support career growth at the college.

PITFALLS TO AVOID IN THE PERFORMANCE REVIEW PROCESS

Because it is important that the performance review process is constructive and that it enhances employee motivation, supervisors should be aware of common pitfalls. Research shows that these pitfalls can cause employee anger, loss of employee morale and motivation, as well as grievance or legal action. These pitfalls include:

- The supervisor does not communicate adequately to the employee the job duties, performance objectives and the performance standards before the formal review.

Remember, employees must be clear on the job duties, performance objectives and expected performance standards at the beginning of each performance review cycle. Surprising the employee with previously undefined job duties and performance during the formal performance review most likely will cause anger.

- The supervisor does not adequately prepare for the formal performance review. A supervisor who displays little thought given to the performance review process, by not spending enough time on the form, by not completing it in a timely manner, by not citing specific examples, etc., may demoralize the employee.

Remember, performance reviews are important to employee motivation and enhanced productivity and conducting effective, meaningful and legal performance reviews is the critical part of a supervisor's job responsibilities.

- The supervisor commits the "recent-cy error." The recent-cy error occurs when the performance review is based largely on the employee's most recent performance, good or bad, rather than on performance throughout the review period. The recent-cy error results in biased evaluations.

Remember, an accurate and fair performance review must be based on an employee's performance over the course of the year. Keep a record of the employee's accomplishments during the year and specific examples of what the employee does well and what he/she needs to improve.

- The supervisor commits the "halo error." The halo error occurs when a supervisor judges an employee favorably or unfavorably on the basis of one strong or weak point on which the supervisor places a high value.

Remember, to conduct an accurate and fair review, the supervisor must evaluate each job duty and/or objective independently from each other. Be as objective as possible. Just because the employee is very good, or very poor in one job duty/objective, does not mean that the same holds true for other job duties/objectives.

- The supervisor commits the "central tendency error." The central tendency error occurs when the evaluator is reluctant to assign either high or low ratings, when appropriate, but instead chooses to rate all employees as average.

Remember, be as honest as possible in your ratings. Citing specific examples, give an employee a high rating if it is deserved; likewise, give a low rating, citing specific examples, if it is deserved.

SUPERVISOR'S RESPONSIBILITIES IN THE PERFORMANCE REVIEW PROCESS

Remember to Keep the End in Mind regarding the Performance Review:

- To **validate** the employee's value/contributions to the team and College in two steps: 1) completing periodic performance feedbacks and a final substantive yearly performance review. Accepting; 2) and using his/her self-evaluation.
- To motivate the employee to excel.
- To partner with the employee for developing increased performance success.
- To permit the employee to be heard and understood concerning job needs, issues, concerns and self-evaluation.

...These end results therefore require that the supervisor/evaluator practice continuous performance management skills of the One Minute Manager™ (OMM) by Dr. Ken Blanchard: coaching, directing, leading, acknowledging leading up to the actual yearly documented performance review discussion.

Clarity

- Clear on the employee's duties, goals and expectations of job
- Clear on what constitutes Satisfactory, Exceeds and Exemplary performance relative to the duties, goals and expectations (e.g. LSSC, Team & Specific Job Performance Indicators)
- Clear on challenges of job
- Clear on the employee's talents
- Clear on the employee's needed improvement areas
- Clear on the employee's needs in order to be successful performing the job
- Clear on performance review outcomes especially employee morale/motivation, the development and/or improvement plan

Communication

- To openly discuss job/tasks situations as such arises
- To provide assistance, coaching, challenges as needed (whether requested or not)
- To state job concerns with recommendations for improved efficiency/success
- To assist in the performance review/discussion
- To convey specific examples or documentation supporting ratings of E, EE, U
- To seek understanding and to be understood
- To honor the employee's request for a follow-up performance discussion after the formal review to clarify the review and subsequent actions

Documentation

- Complete the Performance Review form honestly and completely
- Use the appropriate information from the employee's self-evaluation

- Use solid examples supporting one's ratings – clarify and inquire about any reported examples that are unclear or questionable
- To acknowledge when you have made an error (omission of important info or incorrect info/data) and to then fix it

JOB INCUMBENT'S RESPONSIBILITIES IN THE PERFORMANCE REVIEW PROCESS

Clarity

- Clear on duties, goals and expectations of job
- Clear on what constitutes Satisfactory, Exceeds and Exemplary performance relative to the duties, goals and expectations (e.g. LSSC, Team & Specific Job Performance Indicators)
- Clear on challenges of job
- Clear on one's talents
- Clear on one's improvement areas
- Clear on one's needs in order to be successful performing job
- Clear on performance review outcomes especially development and/or improvement plan

Communication

- To openly discuss job/tasks situations as such arises
- To request assistance, coaching, challenges as needed
- To state job concerns with recommendations for improved efficiency/success
- To assist in the performance review/discussion
- To convey one's examples or documentation supporting self-ratings
- To seek understanding and to be understood
- To request a follow-up performance discussion after the formal review to clarify the review and subsequent actions

Documentation

- Complete Performance Review Self-Evaluation honestly & completely and submit to supervisor a minimum of two weeks prior to actual formal performance review discussion (unless negotiated differently)
- Compile and provide specific & honest behavioral examples supporting self-ratings for:
 - Exemplary
 - Exceeds Expectations
 - Unsatisfactory

For Administrators and Select Managers:

HOW TO ESTABLISH PERFORMANCE GOALS

Setting performance goals is the central part of the performance review process for administrators and select managers. Select managers are those managers whom the supervisor, department head and/or VP determine have assigned annual key projects which directly support major College initiatives. The setting of performance goals is a critical time for the supervisor and employee to assess individual, departmental and college needs for the upcoming year. In setting performance goals, emphasis should be placed on the college's strategic plan, improvement of the individual's own performance and accomplishment of departmental or unit goals. The setting of performance goals is a two-way process, and it is important that the employee understands the importance of the goals and commits to them.

On the following page is an example of how an administrator position's duties connect not only to assigned performance goals, but also to the appropriate Annual Plan Initiative(s).

Even though there may be numerous performance goals that could be set for most positions, performance goals should be limited to what is most important. Once established, it is important for a supervisor and employee to discuss the performance goals over the course of the year. Not only is the feedback important to the employee, but it is also critical to assess if any changes to the performance goals need to be made due to a change or shift in individual, departmental or college needs. If there are any changes to the performance goals over the course of the year, these changes must be noted in an addendum that will be added to the performance review form.

As a general guideline, strive to set performance goals that are SMART:

- **SPECIFIC** - Expectations should describe specific behaviors that are required for the job performance.
- **MEASURABLE** - Expectations should allow for goal monitoring and measurement.
- **ATTAINABLE** - Expectations should be realistic for the employee to achieve and accomplish.
- **RELEVANT** - Expectations must be relevant to the requirements of the current position, the department and the college.
- **TRACKABLE** - Expectations should be trackable by either the supervisor or the employee to allow for the monitoring and evaluation of performance levels.

Example of Administrator: Job Duties, Relationship to Goals and Linkage to College Business Plans

Position: Human Resources Director

| DUTY (from the Job Description) | Performance Goal | Link to College Strategic Plan/Annual Plan Initiatives |
|--|---|---|
| Administer the position classification system and maintain wage and salary plans | Develop and implement a faculty rank and promotion system based upon portfolio, peer review, etc. as benchmarked to other CCs | Annual Plan Initiative/Goal VII |
| Coordinate & administer college performance evaluation program | Develop and recommend to Cabinet & Board approval of a new performance review process for employees which are more performance-based, collaborative, etc. | Annual Plan Initiative/Goal VII |
| | For Administrators: develop and implement a performance review system that will support pay for performance compensation | Strategic Goal IV |

APPENDICES

Important Note:

Enclosed are SAMPLE Policies, Performance Evaluation/Review forms which are for illustrative purposes only. Also enclosed are Standards/Rubrics. Because policies and forms are updated as necessary, please obtain the most current policies and forms from the College web sites: Forms, Rules & Procedures.

**LAKE-SUMTER STATE COLLEGE
ADMINISTRATIVE PROCEDURE**

TITLE: PROGRESSIVE DISCIPLINE

NUMBER: PRO 5-25

REFERENCE: Board Rule 5.08

PAGE 29 OF 3

A. General Information

The College, as approved by the District Board, subscribes to the principle of using objective and appropriate discipline to correct employee conduct and performance. Disciplinary action when imposed will be issued whenever appropriate in a progressive manner as defined here dependent upon the seriousness of the offense, the established facts taking into consideration aggravating and mitigating circumstances, prior disciplinary action, and any other information deemed relevant, or as otherwise required by law. To enable the application of consistent and appropriate discipline with corrective action, except when the violation or offense is serious enough to warrant immediate suspension or termination, progressive discipline will be used as related herein.

B. Types of Disciplinary Action Associated with Progressive Discipline

When progressive discipline is administered it shall be administered appropriately dependent, in part, on the facts and circumstances of each case. The following types of disciplinary action will be applied as appropriate.

1. Oral Reprimand

An oral reprimand involves a discussion between the supervisor and the employee regarding violation of performance standards with an emphasis on correcting the employee's behavior.

Documentation of an oral reprimand shall be maintained, and a copy may be placed in the employee's personnel file.

2. Written Reprimand

- a. For more serious or repeated cases of performance standards violations, the supervisor (with approval of the next higher level supervisor) will counsel the employee as to the correct and expected behavior. This counseling will be recorded along with circumstances of the violation and a warning, if appropriate, in memorandum form. The original memo will be given to the employee and a copy sent to the Human Resources Office for the employee's file.

New: 4/8/08

- b. For repeated job performance offenses and/or serious misconduct the supervisor will complete an updated performance review. The appropriate areas on the performance evaluation form equating to the offenses or conduct violations will be marked as "Unsatisfactory" with supporting documentation. The supervisor will develop with the assistance of HR a specific development or remediation plan of actions and dates to assist the employee in correcting the performance issues. Depending upon the frequency of the performance offense and/or the seriousness of the misconduct, the employee may be placed also on probation. (See next step for details).
- c. One specific development action for a disciplined employee may be that he/she be directed to the Employee Assistance Program for performance support commensurate to the performance violation. In such cases attendance and completion of the rehabilitative support plan may be a condition of continued employment. (See Drug Free Policy, PRO 5-24, for other information regarding EAP.)

3. Probation and/or Suspension

An employee may be placed on probation as a result of serious misconduct or based upon the degree and frequency of job performance below standard as documented in the performance review. The employee will be presented in writing the following:

- a. the reason for the probation;
- b. a specific action plan for remediation containing defined actions to be taken by the employee for producing specific positive outcomes;
- c. any terms or conditions of the probation for improvement/remediation;
- d. the length of the probation period required for completion of the action plan and all appropriate terms or conditions of the probation; and,
- e. the consequences for failure in successfully completing the probation/remediation plan. Such consequences may be suspension or dismissal as warranted.

The suspension of an employee, with or without pay, shall normally be based on the recommendation of the supervisor with counsel from Human Resources. The recommendation shall be subject to the final approval of the President or designee to ensure consistency of action throughout the institution. Upon return from any suspension the employee will automatically be placed in a probationary status for a six-month period. The Human Resources Office will issue all suspensions.

4. Dismissal (Discharge)

When the above stated actions fail in correcting any employee's performance or behavior, or when the offense requires immediate separation from employment, a discharge action shall be taken. With counsel from HR the supervisor shall normally recommend the action to the appropriate Vice President. The Vice President or HR shall inform the President of the situation and recommendation. The recommendation shall be subject to the approval of the President or designee, who shall issue the discharge.

C. Administration of Disciplinary Action

The President delegates authority to administer disciplinary action as follows:

1. An Oral Reprimand is delegated to the employee's immediate supervisor or higher level supervisor;
2. A Written Reprimand is delegated to the employee's immediate supervisor with the approval of the next higher level supervisor.
3. In the case of a proposed Probation, Suspension or Dismissal, the highest level supervisor shall counsel with HR. HR will then arrange for a review of the proposed action by the President or designee. If the proposed action is approved, the President, or designee, will implement the Suspension or Dismissal.

D. Right of Grievance

Other than those employees serving in a probationary status, employees disciplined under this procedure relative to suspension and dismissal shall have the right to file a grievance. With the exception of those employees in probation, employees who are disciplined under this procedure shall have the right to file a grievance. The grievance must be filed within ten (10) work days of the disciplinary action established. See Procedure 2-10, Grievance Procedure, for details. Instead of exercising the College's grievance procedure continuing contract faculty may choose to exercise their rights to an administrative hearing in accordance with the guidelines of Chapter 120 Administrative Hearing, FL Statutes.

Instructions for Completing Administrator Annual Performance Review

The Administrator Annual Performance Review process has four distinct sections or parts, A-E. The following information details how and when each section or part is completed. A probationary review requires altered timeframes from those specified below: for assistance consult with Human Resources.

A. Performance Objectives/Expectations Established

The employee collaborates with his/her supervisor to develop the year's performance objectives/expectations and development plan. Such are entered into the form, Part A1, A2 and D. Performance objectives in Part A1 have measurements and must be linked to the official College Annual Plan Actions or respective Division Initiatives as appropriate. Other important performance objectives with measurements that are not linked to College Annual Plan Actions or Division Initiatives but necessary for the respective department or unit's successful operations are entered into Part A2. The Development Plan (Part D) contains an objective or action and a respective due date. Upon completion of Parts A & D, both the employee and supervisor sign and date the Section A, Objectives/Expectations Established; this action verifies that mutual goals/objectives have been set. **This Section A is to be completed no later than July 30th and retained by employee and supervisor.**

B. Interim Review(s)

The employee receives an interim review approximately 6 months from the establishment of the year's performance objectives. This interim review, Part B, is brief, concise and is really a communication device to ensure that the supervisor and employee are in complete agreement and understanding of not only the objectives but also the progress toward such. Since the business world can change quickly the interim review permits adjustments to be made to the necessary objectives. Upon completion of Part B, the mid-year interim review, both the employee and supervisor sign Section B of the Performance Review. **This Section B is to be completed no later than January 30th and retained by employee and supervisor.**

C. Overall Annual Performance Accomplishments Review

The employee assesses his/her level of accomplishment for each performance objective and submits such information to the supervisor. The employee also completes a self-assessment of his/her Job Factors/Competencies and submits that also to the supervisor.

The supervisor armed with: 1) the employee's assessment of his/her performance accomplishments, employee's assessment of job factors/competencies, and employee's draft development plan; and, 2) notes about the employee's performance completes the employee's performance review. The supervisor conducts a performance review discussion with the employee covering his/her accomplishments' status and job factors/competencies. After the supervisor and employee collaborate on a Development Plan, see below, and then the employee and supervisor sign Section C of the Performance Review. **This Section C is to be completed no later than June 15th and entire document (originals) sent to HR.**

D. Development Objectives & Plan

After the accomplishments recorded in Part C have been reviewed (discussed), and the Job Factors assessment reviewed, the supervisor and employee collaboratively finalize an appropriate new development plan. The development plan is documented in Part D.

E. Employee Comments

Comments are entered at the option of the employee. **Although Section E is optional it should be completed by the employee no later than August 15th.**



Administrator Annual Performance Review

9501 U.S. Highway 441, Leesburg, FL 34788

___ Probationary Review

Name: _____ XID: _____ Year: _____

Title: _____ Supervisor: _____

A. Objectives/Expectations Established *(by July 31 retain for self, do not submit to HR)*

Supervisor's Signature *Date* *Employee's Signature* *Date*

B. Interim Review *(by January 30 retain for self, do not submit to HR)*

Supervisor's Signature *Date* *Employee's Signature* *Date*

C. Overall Annual Performance *(by June 15 and submit entire review to HR for file; keep a copy)*

| | | |
|------|----------------------|---|
| (E) | Exemplary | Performs well beyond normal requirements |
| (EE) | Exceeds Expectations | Performs above normal requirements |
| (ME) | Meets Expectations | Fulfills normal requirements |
| (NI) | Needs Improvement | Improvement is needed to reach normal requirements |
| (U) | Unsatisfactory | Considerable improvement is needed to reach acceptable standards of performance |
| (NA) | Not Applicable | Factor does not apply to the employee being reviewed |

___ E ___ EE ___ ME ___ NI ___ U ___ N/A

Supervisor's Signature *Date* *Employee's Signature* *Date*

Specific supervisor and employee comments are recorded on the following pages. The employee's signature does not necessarily indicate agreement with the information discussed or the final rating. The employee's signature indicates that the performance review was conducted and the information discussed.

**PART A.1: INDIVIDUAL PERFORMANCE OBJECTIVES LINKED TO COLLEGE ANNUAL PLAN ACTIONS
AND
DIVISION INITIATIVES (completed by July 30th)**

| | Performance Objective | Measurement | Linkage to College Annual Plan Actions & Division Initiatives (Indicate Annual Plan Action # or Division Initiative #) |
|----|-----------------------|-------------|---|
| 1. | | | |
| 2. | | | |
| 3. | | | |
| 4. | | | |
| 5. | | | |
| 6. | | | |
| 7. | | | |

**PART A.2: IMPORTANT INDIVIDUAL PERFORMANCE OBJECTIVES FOR DEPARTMENT/UNIT
OPERATIONS**

(Not Directly Linked to Annual Plan Actions and/or Division Initiatives; completed by July 30th)

| | Performance Objective | Measurement |
|---------|-----------------------|-------------|
| 8. | | |
| 9. | | |
| 10 . | | |
| 11 . | | |
| 12 . | | |

PART B: INTERIM PERFORMANCE REVIEW *(completed by January 30th)*

| | | |
|------|----------------------|---|
| (E) | Exemplary | Performs well beyond normal requirements |
| (EE) | Exceeds Expectations | Performs above normal requirements |
| (ME) | Meets Expectations | Fulfills normal requirements |
| (NI) | Needs Improvement | Improvement is needed to reach normal requirements |
| (U) | Unsatisfactory | Considerable improvement is needed to reach acceptable standards of performance |
| (NA) | Not Applicable | Factor does not apply to the employee being reviewed |

1. Performance Objective

☐ E ☐ EE ☐ ME ☐ NI ☐ U ☐ N/A

Comments:

2. Performance Objective

☐ E ☐ EE ☐ ME ☐ NI ☐ U ☐ N/A

Comments:

3. Performance Objective

☐ E ☐ EE ☐ ME ☐ NI ☐ U ☐ N/A

Comments:

4. Performance Objective

☐ E ☐ EE ☐ ME ☐ NI ☐ U ☐ N/A

Comments:

PART B: INTERIM PERFORMANCE REVIEW *(cont'd.)*

| | | |
|------|----------------------|---|
| (E) | Exemplary | Performs well beyond normal requirements |
| (EE) | Exceeds Expectations | Performs above normal requirements |
| (ME) | Meets Expectations | Fulfills normal requirements |
| (NI) | Needs Improvement | Improvement is needed to reach normal requirements |
| (U) | Unsatisfactory | Considerable improvement is needed to reach acceptable standards of performance |
| (NA) | Not Applicable | Factor does not apply to the employee being reviewed |

5. Performance Objective

☐ E ☐ EE ☐ ME ☐ NI ☐ U ☐ N/A

Comments:

6. Performance Objective

☐ E ☐ EE ☐ ME ☐ NI ☐ U ☐ N/A

Comments:

7. Performance Objective

☐ E ☐ EE ☐ ME ☐ NI ☐ U ☐ N/A

Comments:

8. Performance Objective

☐ E ☐ EE ☐ ME ☐ NI ☐ U ☐ N/A

Comments:

PART B: INTERIM PERFORMANCE REVIEW *(cont'd.)*

| | | |
|------|----------------------|---|
| (E) | Exemplary | Performs well beyond normal requirements |
| (EE) | Exceeds Expectations | Performs above normal requirements |
| (ME) | Meets Expectations | Fulfills normal requirements |
| (NI) | Needs Improvement | Improvement is needed to reach normal requirements |
| (U) | Unsatisfactory | Considerable improvement is needed to reach acceptable standards of performance |
| (NA) | Not Applicable | Factor does not apply to the employee being reviewed |

9. Performance Objective

☐ E ☐ EE ☐ ME ☐ NI ☐ U ☐ N/A

Comments:

10. Performance Objective

☐ E ☐ EE ☐ ME ☐ NI ☐ U ☐ N/A

Comments:

11. Performance Objective

☐ E ☐ EE ☐ ME ☐ NI ☐ U ☐ N/A

Comments:

12. Performance Objective

☐ E ☐ EE ☐ ME ☐ NI ☐ U ☐ N/A

Comments:

PART C: ANNUAL PERFORMANCE ACCOMPLISHMENTS *(final completed by June 15 and submitted to HR)*

| | | |
|------|----------------------|---|
| (E) | Exemplary | Performs well beyond normal requirements |
| (EE) | Exceeds Expectations | Performs above normal requirements |
| (ME) | Meets Expectations | Fulfills normal requirements |
| (NI) | Needs Improvement | Improvement is needed to reach normal requirements |
| (U) | Unsatisfactory | Considerable improvement is needed to reach acceptable standards of performance |
| (NA) | Not Applicable | Factor does not apply to the employee being reviewed |

1. Performance Objective

☐ E ☐ EE ☐ ME ☐ NI ☐ U ☐ N/A

Comments:

2. Performance Objective

☐ E ☐ EE ☐ ME ☐ NI ☐ U ☐ N/A

Comments:

3. Performance Objective

☐ E ☐ EE ☐ ME ☐ NI ☐ U ☐ N/A

Comments:

4. Performance Objective

☐ E ☐ EE ☐ ME ☐ NI ☐ U ☐ N/A

Comments:

PART C: ANNUAL PERFORMANCE ACCOMPLISHMENTS *(final) cont'd.*

| | | |
|------|----------------------|---|
| (E) | Exemplary | Performs well beyond normal requirements |
| (EE) | Exceeds Expectations | Performs above normal requirements |
| (ME) | Meets Expectations | Fulfills normal requirements |
| (NI) | Needs Improvement | Improvement is needed to reach normal requirements |
| (U) | Unsatisfactory | Considerable improvement is needed to reach acceptable standards of performance |
| (NA) | Not Applicable | Factor does not apply to the employee being reviewed |

5. Performance Objective

☐ E ☐ EE ☐ ME ☐ NI ☐ U ☐ N/A

Comments:

6. Performance Objective

☐ E ☐ EE ☐ ME ☐ NI ☐ U ☐ N/A

Comments:

7. Performance Objective

☐ E ☐ EE ☐ ME ☐ NI ☐ U ☐ N/A

Comments:

8. Performance Objective

☐ E ☐ EE ☐ ME ☐ NI ☐ U ☐ N/A

Comments:

PART C: ANNUAL PERFORMANCE ACCOMPLISHMENTS *(final) cont'd.*

| | | |
|------|----------------------|---|
| (E) | Exemplary | Performs well beyond normal requirements |
| (EE) | Exceeds Expectations | Performs above normal requirements |
| (ME) | Meets Expectations | Fulfills normal requirements |
| (NI) | Needs Improvement | Improvement is needed to reach normal requirements |
| (U) | Unsatisfactory | Considerable improvement is needed to reach acceptable standards of performance |
| (NA) | Not Applicable | Factor does not apply to the employee being reviewed |

9. Performance Objective

☐ E ☐ EE ☐ ME ☐ NI ☐ U ☐ N/A

Comments:

10. Performance Objective

☐ E ☐ EE ☐ ME ☐ NI ☐ U ☐ N/A

Comments:

11. Performance Objective

☐ E ☐ EE ☐ ME ☐ NI ☐ U ☐ N/A

Comments:

12. Performance Objective

☐ E ☐ EE ☐ ME ☐ NI ☐ U ☐ N/A

Comments:

PERFORMANCE FACTORS/COMPETENCIES

| SERVICE EXCELLENCE, See attached Rubric to assign appropriate rating. | Rating | Examples (Strengths or Improvements) |
|--|--------|--------------------------------------|
| 1. RESPECTFUL Key Behaviors | | |
| A. Treat people the way they want to be treated (active listening, responsive) | | |
| B. Be courteous (polite, friendly, caring, honoring personal space) | | |
| C. Respect lines of authority in communication, procedures and policies | | |
| D. Appreciate differences (disabilities, socio-economic status, ethnic, gender, age, religion, lifestyles, values, cultures) | | |
| 2. COMPETENT Key Behaviors | | |
| A. Utilize effectively knowledge, skills and resources | | |
| B. Exercise active problem-solving and Informed decision-making | | |
| C. Be efficient and reliable | | |
| D. Follow processes consistently | | |
| 3. RESPONSIVE Key Behaviors | | |
| A. Act in a timely manner | | |
| B. Demonstrate accessibility (in person, by phone, by email) | | |
| C. Be dependable by following-up and following-through on promises | | |
| D. Be informative by providing accurate information and solutions | | |
| | | |
| 4. COLLABORATIVE Key Behaviors | | |
| A. Seek and provide help to accomplish goals | | |
| B. Engage stakeholders for input | | |
| C. Communicate interdepartmentally | | |
| D. Build relationships and win-win partnerships with honesty, trust | | |

| SERVICE EXCELLENCE SUPERVISORY ABILITY (Those who supervise must be assessed on how well they are modeling, achieving, and promoting the Service Excellence (SE) Initiatives. <u>See Attached Rubric to assess SE ratings.</u> | Rating | Examples (Strengths or Improvements) |
|--|--------|--------------------------------------|
| SE: The Manager/Supervisor conducts staff meetings with Service Excellence as the first item on the agenda. The Manager/Supervisor is well prepared with information, engages the staff to participate, and recognizes those who demonstrate the "WOW" factor of Service Excellence. | | |
| SE: The Manager/Supervisor demonstrates leadership in moving LSSC to a culture of Service Excellence . The Supervisor models LSSC's Service Excellence Philosophy: "We inspire confidence through every interaction to empower lives and build futures by providing a caring and supportive learning environment." | | |
| SE: The Manager/Supervisor holds self and others accountable to the LSSC's Service Excellence Standards of respect, competence, responsiveness, and collaboration, in all interactions. | | |

- Knowledge:** *Understanding required for accomplishing assigned duties, objectives and responsibilities. Consider the following: currency in field, college policies & procedures, accreditation, strategic planning and legal issues.*
☐E ☐EE ☐ME ☐NI ☐U ☐N/A
- Communication:** *Effective informing and listening skills. Consider the following: speaking, writing, listening, questioning, and informing.*
☐E ☐EE ☐ME ☐NI ☐U ☐N/A
- Decision Making:** *Using information for appropriate outcomes. Making effective decisions within scope of job responsibility that are timely and pertinent. Consider the following: gathering, collaborating, reviewing, analyzing, and evaluating data toward making decisions.*
☐E ☐EE ☐ME ☐NI ☐U ☐N/A
- Leadership and Motivation:** *Creating and maintaining a productive environment whether one is a supervisor or not. Consider the following: demonstrating college values, pursuing excellence, fostering commitment, modeling positive examples, mentoring, coaching, and being available/accessible/approachable.*
☐E ☐EE ☐ME ☐NI ☐U ☐N/A
- College and Community Relations:** *Demonstrating commitment to improving the college atmosphere, services and image. Consider the following: college activities/committees, community boards/service, outreach and recruitment/retention.*
☐E ☐EE ☐ME ☐NI ☐U ☐N/A
- Resource Management:** *Being efficient and productive within the organization, effective utilization and evaluation of resources. Consider the following: budget, personnel, time, materials, and records.*
☐E ☐EE ☐ME ☐NI ☐U ☐N/A

7. Professional Development: *Demonstrating commitment to continued improvement and currency in field for self and reporting employees. Consider the following: attending and or promoting conferences/workshops/seminars; reading; pursuing learning opportunities, i.e. self-study, research, and participating in professional organization for self and reporting employees.*

☐E ☐EE ☐ME ☐NI ☐U ☐N/A

COMMENTS on any of the above ratings (Specific Feedback – Positive and Corrective):

Job Factors/Competencies Overall Rating:

| | | |
|------|----------------------|---|
| (E) | Exemplary | Performs well beyond normal requirements |
| (EE) | Exceeds Expectations | Performs above normal requirements |
| (ME) | Meets Expectations | Fulfills normal requirements |
| (NI) | Needs Improvement | Improvement is needed to reach normal requirements |
| (U) | Unsatisfactory | Considerable improvement is needed to reach acceptable standards of performance |
| (NA) | Not Applicable | Factor does not apply to the employee being reviewed |

☐E ☐EE ☐ME ☐NI ☐U ☐N/A

PART D: DEVELOPMENT OBJECTIVES & PLAN

| Development Objective/Action | Anticipated Due Date |
|------------------------------|----------------------|
| | |
| | |
| | |
| | |
| | |

PART E: EMPLOYEE COMMENTS (optional)



9501 U.S. Highway 441, Leesburg, FL 34788

Managerial & Technical Employee Performance Review

IF THIS IS NOT A PROBATIONARY REVIEW THEN THE PERFORMANCE REVIEW IS TO BE COMPLETED ON EMPLOYEE'S SERVICE ANNIVERSARY DATE.

INSTRUCTIONS:

1. Prior to the Performance Review, the employee is to do a self evaluation using this form, and give a copy of it to the evaluator at an agreed upon date prior to the review. The evaluator/supervisor may conduct a pre-review discussion to clarify the employee's self-evaluation.
2. Evaluator/Supervisor completes a Performance Review form and has his/her supervisor sign the completed form before conducting the review discussion with the employee.
3. The performance review form must be completed as follows:
 - **Job Function Duties and/or Performance Objectives:** (Page 1) addresses specific duties as listed in the employee's job description or performance objectives if established. Check mark the appropriate box if Job Function Duties or Performance Goals/Objectives will be evaluated and listed. These Job Function Duties or Performance Objectives are to be listed in the Duty or Performance Objective column. Each of these are to be rated and examples must be provided to support the ratings for E, EE and U.

ASSIGN AN "OVERALL RATING" based on the result of this section of the review.

Note: One or more unsatisfactory marks equates to an Overall Unsatisfactory Rating.

- **Job Factors/Competencies** (pages 2 and 3). The Job Factors/Competencies section should be evaluated on the employee's actual performance for each factor. If the evaluator believes an employee's rating reflects both "Strengths" and "Needs Improvement" in a competency, he/she rates it accordingly. Examples must be provided to support ratings of E, EE and U. The "Needs Improvement Summary" is to be completed based on the results of this section. Any rating of NI or U must be clearly and concisely stated here.

THIS SECTION OF THE PERFORMANCE REVIEW FORM DOES NOT HAVE AN "OVERALL RATING."

- **Professional Development Plan** (page 4). List/define the specific development goals and timeframes. Be sure to state specific goals or actions for any "Needs Improvement" or "Unsatisfactory" duty or job factor as noted in the "Improvement Summary". While the evaluator will be responsible for monitoring the improvement of the employee within the specified timeline, the employee should feel free to address his/her status with the evaluator as necessary.

This part should also address appropriate and specific career/long-term development goals. If an employee has several Needs Improvement and Unsatisfactory areas, then there should be no career development goals established. By doing this emphasis is placed upon the employee improving his/her current job performance.

4. After concluding the review, the form must be signed by the Employee (to accompany the signatures of the Evaluator and the Evaluator's Supervisor). The employee may add comments in the Comments section. The original signed document is to be sent to Human Resources.



**Managerial & Technical Employee Performance
Review (Levels MA1-7, PT1-9)**

9501 U.S. Highway 441, Leesburg, FL 34788

☐ Probationary Review

Name: _____ Evaluation Period From: _____ to _____

Position: _____ Department: _____ XID: _____

EVALUATION STANDARDS

- (E) Exemplary Performs well beyond normal requirements
 (EE) Exceeds Expectations Performs above normal requirements
 (ME) Meets Expectations Fulfills normal requirements
 (NI) Needs Improvement Improvement is needed to reach normal requirements
 (U) Unsatisfactory Considerable improvement is needed to reach acceptable standards of performance
 (NA) Not Applicable Factor does not apply to the employee being evaluated

Performance Factors: Mark the box of the "evaluation standard" which describes the employee's actual performance. Examples should be given to indicate the reason(s) for E, EE and U ratings. Both an Employee Self-Performance Review and a Supervisor's Performance Review must be completed.

Job Function and/or Performance Objectives: Employee's execution of job function (duties) assigned and or completeness of established performance goals/objectives. Please check the appropriate box that pertains to the above named employee.

☐ **Job Function (Duties)**

☐ **Performance Goals/Objectives**

| No. | Duty or Performance Goal/Objective | Evaluation w/Examples | E | EE | ME | NI | U |
|-----|------------------------------------|-----------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 1. | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 9. | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 10. | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 11. | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 12. | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 13. | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 14. | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

| | | | | | | | |
|-----|--|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 15. | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|-----|--|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|

Overall Rating of Employee's Job Function (Duties) and/or Performance Objectives

☐ E ☐ EE ☐ ME ☐ NI ☐ U ☐ N/A

PERFORMANCE FACTORS/COMPETENCIES

| SERVICE EXCELLENCE, See attached Rubric to assign appropriate rating. | Rating | Examples (Strengths or Improvements) |
|--|--------|--------------------------------------|
| 5. RESPECTFUL Key Behaviors | | |
| A. Treat people the way they want to be treated (active listening, responsive) | | |
| B. Be courteous (polite, friendly, caring, honoring personal space) | | |
| C. Respect lines of authority in communication, procedures and policies | | |
| D. Appreciate differences (disabilities, socio-economic status, ethnic, gender, age, religion, lifestyles, values, cultures) | | |
| 6. COMPETENT Key Behaviors | | |
| A. Utilize effectively knowledge, skills and resources | | |
| B. Exercise active problem-solving and Informed decision-making | | |
| C. Be efficient and reliable | | |
| D. Follow processes consistently | | |
| 7. RESPONSIVE Key Behaviors | | |
| A. Act in a timely manner | | |
| B. Demonstrate accessibility (in person, by phone, by email) | | |
| C. Be dependable by following-up and following-through on promises | | |
| D. Be informative by providing accurate information and solutions | | |
| | | |
| 8. COLLABORATIVE Key Behaviors | | |
| A. Seek and provide help to accomplish goals | | |
| B. Engage stakeholders for input | | |
| C. Communicate interdepartmentally | | |
| D. Build relationships and win-win partnerships with honesty, trust | | |

Professional Knowledge: Employee's demonstrated job knowledge, understanding, and ability and willingness to learn all aspects of his/her assigned duties and responsibilities.

☐ E ☐ EE ☐ ME ☐ NI ☐ U ☐ N/A

Example(s):

Organizational Skills: Effectiveness and efficiency with which the employee plans, organizes, schedules, and coordinates the work for which he/she is responsible.

☐ E ☐ EE ☐ ME ☐ NI ☐ U ☐ N/A

Example(s):

Decision Making: The employee's ability to take action and make decisions independently, the degree of open-mindedness in his/her decisions, and soundness of the employee's judgment in making decisions.

☐ E ☐ EE ☐ ME ☐ NI ☐ U ☐ N/A

Example(s):

Initiative and Application: The employee's ability to recognize the need for change, find creative solutions, and follow through on the plan for change(s).

☐ E ☐ EE ☐ ME ☐ NI ☐ U ☐ N/A

Example(s):

Communication Skills: The employee's ability to communicate effectively with students, the public, and fellow employees verbally and in writing, the ability to listen effectively. Person is able to speak well in group situations (i. e. meetings, seminars and conferences). Employee maintains confidentiality, utilizes the appropriate means of communication, and uses tact in difficult situations.

☐ E ☐ EE ☐ ME ☐ NI ☐ U ☐ N/A

Example(s):

Quality of Work: Employee's work output in terms of accuracy, thoroughness, and appearance.

☐ E ☐ EE ☐ ME ☐ NI ☐ U ☐ N/A

Example(s):

Community Contact: The employee's courtesy to others, professional behavior, effectiveness in maintaining rapport with others. He/she strives to give a positive image of LSSC when addressing the needs of students, staff and community.

☐ E ☐ EE ☐ ME ☐ NI ☐ U ☐ N/A

Example(s):

Supervisory Effectiveness: The recognition and utilization of subordinate's talents; delegation of appropriate work to others; efforts to coach, motivate, and train subordinates; and the degree of effort expended to encourage cooperation, teamwork, and personal effectiveness on the part of subordinates.

☐ E ☐ EE ☐ ME ☐ NI ☐ U ☐ N/A

Example(s):

| SERVICE EXCELLENCE SUPERVISORY ABILITY (Those who supervise must be assessed on how well they are modeling, achieving, and promoting the Service Excellence (SE) Initiatives. <u>See Attached Rubric to assess SE ratings.</u> | Rating | Examples (Strengths or Improvements) |
|--|--------|--------------------------------------|
| SE: The Manager/Supervisor conducts staff meetings with Service Excellence as the first item on the agenda. The Manager/Supervisor is well prepared with information, engages the staff to participate, and recognizes those who demonstrate the "WOW" factor of Service Excellence. | | |
| SE: The Manager/Supervisor demonstrates leadership in moving LSSC to a culture of Service Excellence . The Supervisor models LSSC's Service Excellence Philosophy: "We inspire confidence through every interaction to empower lives and build futures by providing a caring and supportive learning environment." | | |
| SE: The Manager/Supervisor holds self and others accountable to the LSSC's Service Excellence Standards of respect, competence, responsiveness, and collaboration, in all interactions. | | |

NEEDS IMPROVEMENT SUMMARY

Below summarize specifically any NI or U rated areas.

PROFESSIONAL DEVELOPMENT PLAN

Below please define goal(s), approximate timeline and provider:

Evaluator's Signature Date

Supervisor of Evaluator Signature

Date

I have reviewed this Performance Review with my evaluator and my signature indicates that I have read my Performance Review.

- ☐ I do wish to attach written comments.
☐ I do **not** wish to attach written comments.

Employee's Signature Date



☐ Probationary Review

Name: _____

Review Period From: ____ **to** ____

Position: _____

Position No: _____

EVALUATION STANDARDS - JOB FUNCTION (DUTIES AND TASKS)

E - Exemplary Performs well beyond normal requirements
 EE – Exceeds Expectations Performs above normal requirements
 ME – Meets Expectations Fulfills normal requirements
 NI - Needs Improvement Improvement is needed to reach normal requirements
 U - Unsatisfactory Considerable improvement is needed to reach acceptable standards of performance.

Performance Appraisal Factors: Mark the box of the “evaluation rating” which overall describes the employee’s actual performance. Examples should be given to indicate the reason(s) for the rating of each factor. Both an Employee Self-Evaluation and a Supervisor’s Evaluation must be completed.

| No. | Duties / Tasks | Evaluation with Examples | E | EE | ME | NI | U |
|-----|----------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 1. | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 9. | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 10. | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 11. | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Overall Rating of Employee’s Execution of Assigned Job Function (Duties/Tasks)

☐ Exemplary ☐ Exceeds Expectations ☐ Meets Expectations ☐ Needs Improvement
☐ Unsatisfactory ☐ Not Applicable

JOB FACTORS/COMPETENCIES

Performance Appraisal Factors: Mark the RATING box of the “Job Factors/Competencies” Sections with the evaluation standard which describes the employee’s actual performance. Examples should be given to indicate the reason(s) for the rating of each factor. Both an Employee Self-Evaluation and a Supervisor’s Evaluation must be completed. There is no Overall Rating for Job Factors/Competencies.

Rating Key: E-Exemplary EE-Exceeds Expectations ME-Meets Expectations NI-Needs Improvement
 U-Unsatisfactory N/A-Not Applicable

| SERVICE EXCELLENCE, See attached Rubric to assign appropriate rating. | Rating | Strength – Examples | Improvement Needed – Examples |
|--|---------------|----------------------------|--------------------------------------|
| 9. RESPECTFUL Key Behaviors | | | |
| A. Treat people the way they want to be treated (active listening, responsive) | | | |
| B. Be courteous (polite, friendly, caring, honoring personal space) | | | |
| C. Respect lines of authority in communication, procedures and policies | | | |
| D. Appreciate differences (disabilities, socio-economic status, ethnic, gender, age, religion, lifestyles, values, cultures) | | | |
| 10. COMPETENT Key Behaviors | | | |
| A. Utilize effectively knowledge, skills and resources | | | |
| B. Exercise active problem-solving and Informed decision-making | | | |
| C. Be efficient and reliable | | | |
| D. Follow processes consistently | | | |
| 11. RESPONSIVE Key Behaviors | | | |
| A. Act in a timely manner | | | |
| B. Demonstrate accessibility (in person, by phone, by email) | | | |
| C. Be dependable by following-up and following-through on promises | | | |
| D. Be informative by providing accurate information and solutions | | | |
| | | | |
| 12. COLLABORATIVE Key Behaviors | | | |
| A. Seek and provide help to accomplish goals | | | |
| B. Engage stakeholders for input | | | |
| C. Communicate interdepartmentally | | | |
| D. Build relationships and win-win partnerships with honesty, trust | | | |
| KNOWLEDGE, SKILL, ABILITY | Rating | Strength – Examples | Improvement Needed – Examples |
| Demonstrates command of technical/ procedural | | | |

| | | | |
|---|---------------|----------------------------|--------------------------------------|
| requirements of the job and keeps up to date on these as required. | | | |
| Demonstrates required knowledge/ skills and appropriately asks for help. | | | |
| TEAM FOCUS / COLLABORATION | Rating | Strength – Examples | Improvement Needed – Examples |
| Completes designated tasks as assigned. Acts in accordance with department objectives. Works toward win-win solutions. | | | |
| Keeps co-workers informed of changes in processes/procedures in the organization that could impact their jobs. | | | |
| Follows college procedures and processes; completes departmental and interdepartmental forms completely and accurately to support college efficiency and effectiveness. | | | |
| COMMUNICATION | Rating | Strength – Examples | Improvement Needed – Examples |
| Listens to and understands explanations, directions and expressions of need, whether from customers, superiors or co-workers. | | | |
| Clearly expresses needs, explanations and directions to others as required. | | | |
| Provides feedback, engages in follow-up, keeps others informed, and obtains information from others as needed to perform the job effectively. | | | |
| RELIABILITY AND PRODUCTIVITY | Rating | Strength - Examples | Improvement Needed - Examples |
| On duty where and when needed; performs tasks within normal allotted time. | | | |
| Completes work with accuracy and within prescribed deadlines. | | | |
| Utilizes resources, establishes priorities and organizes work to meet required deadlines. | | | |
| INNOVATIVENESS | Rating | Strength - Examples | Improvement Needed - Examples |
| Seeks to learn more about the job and the college. | | | |
| Shows desire for continuous improvement. Welcomes feedback and acts on suggestions. | | | |
| Engages the interest of others in improvement ideas. Brings ideas to the attention of the right people. | | | |
| INTERPERSONAL SKILLS | Rating | Strength - Examples | Improvement Needed – Examples |
| Sets a positive example in work relationships. | | | |
| Maintains composure; capacity to handle stress. | | | |
| Accepts constructive criticism and takes responsibility for one's own actions. Does not blame others. | | | |

| SERVICE EXCELLENCE SUPERVISORY ABILITY (Those who supervise must be assessed on how well they are modeling, achieving, and promoting the Service Excellence (SE) Initiatives. <u>See Attached Rubric to assess SE ratings.</u> | Rating | Strength - Examples | Improvement Needed – Examples |
|--|--------|---------------------|-------------------------------|
| SE: The Manager/Supervisor conducts staff meetings with Service Excellence as the first item on the agenda. The Manager/Supervisor is well prepared with information, engages the staff to participate, and recognizes those who demonstrate the “WOW” factor of Service Excellence. | | | |
| SE: The Manager/Supervisor demonstrates leadership in moving LSSC to a culture of Service Excellence . The Supervisor models LSSC’s Service Excellence Philosophy: “We inspire confidence through every interaction to empower lives and build futures by providing a caring and supportive learning environment.” | | | |
| SE: The Manager/Supervisor holds self and others accountable to the LSSC’s Service Excellence Standards of respect, competence, responsiveness, and collaboration, in all interactions. | | | |
| OTHER SUPERVISORY ABILITIES (Those who supervise must be also assessed on the following behaviors. | | | |
| Gives clear instructions. Effectively conveys direction and organization policy and rules. Communicates decisions and requirements from higher management. | | | |
| Plans and schedules duties and assignments; allocates task fairly and efficiently. Provides assistance and resources to facilitate staff in their duties. | | | |
| Trains and coaches effectively; provides feedback. Makes effective use of performance assessment tools. | | | |
| Makes good personnel decisions; differentiates employees accurately based on skill and performance; makes good decisions/recommendations in hiring, advancement, and termination. | | | |
| Supports and encourages employee growth and opportunities for promotion. | | | |

Needs Improvement Summary: _____

INDIVIDUAL DEVELOPMENT PLAN (PLEASE COMPLETE)

Short-Term Development Plan:

| Areas for Improvement | Main Actions | Development Support | Deadline |
|-----------------------|--------------|---------------------|----------|
| | | | |

Career/Long-Term Development Plan:

| Goals/Potential Position | Main Actions | Development Support | Deadline |
|--------------------------|--------------|---------------------|----------|
| | | | |

Evaluator's Comments (Optional):

Employee's Comments (Optional):

Additional notations if any:

Signatures:

Employee (Signature indicates the evaluation has been read/
discussed with you)

Date

Evaluator

Date

Supervisor of Evaluator

Date

LAKE-SUMTER STATE COLLEGE
FACULTY INSTRUCTIONAL EVALUATION

Faculty name: _____ **Rank:** _____

Department: _____ **Evaluator:** _____ **Date:** _____

All faculty shall be evaluated annually by the appropriate department chair or designated supervisor on the following three areas: teaching excellence; service to the college and the community; and service to the profession and professional growth. Teaching excellence may be evaluated with classroom observation, as appropriate.

Annual contract faculty *must* receive an instructional observation every year; instructional observation is *optional* for continuing contract faculty.

PLEASE NOTE: The faculty member being evaluated should complete pp. 3-7 and p. 10 before meeting with the evaluator.

INSTRUCTIONAL OBSERVATION

5 = outstanding 2 = needs improvement
4 = excellent 1 = not applicable
3 = satisfactory

| | 5 | 4 | 3 | 2 | 1 |
|--|---|---|---|---|---|
| 1. Demonstrates pre-class preparedness | | | | | |

Comments:

| | 5 | 4 | 3 | 2 | 1 |
|---|---|---|---|---|---|
| 2. Demonstrates knowledge of subject matter | | | | | |

Comments:

| | 5 | 4 | 3 | 2 | 1 |
|---|---|---|---|---|---|
| 3. Presents material clearly, comprehensibly, effectively | | | | | |

Comments:

| | | | | | |
|--|---|---|---|---|---|
| 4. Uses media and supporting materials effectively, if appropriate | 5 | 4 | 3 | 2 | 1 |
|--|---|---|---|---|---|

Comments:

| | | | | | |
|--|---|---|---|---|---|
| 5. Responds effectively and respectfully to student questions and comments | 5 | 4 | 3 | 2 | 1 |
|--|---|---|---|---|---|

Comments: _____

| | | | | | |
|---|----------|----------|----------|----------|----------|
| 6. Uses time efficiently to cover material | 5 | 4 | 3 | 2 | 1 |
|---|----------|----------|----------|----------|----------|

Comments:

Comments: _____

5 4 3 2 1

Comments:

Additional evaluator comments: _____

Instructor's comments: _____

Evaluator's signature: _____ **Date:** _____

Instructor's signature: _____ **Date:** _____

**LAKE-SUMTER STATE COLLEGE
FACULTY EVALUATION – INSTRUCTIONAL LOAD**

Faculty name: _____ Rank: _____

Department: _____ Date: _____

COURSES TAUGHT (note online offerings)

| <i>Spring Term - _____ (year)</i> | | <i>Credit Hours/ Contact Hours</i> | <i>Enrollment</i> |
|-----------------------------------|-------|--|-------------------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

| <i>Summer Term - _____ (year)</i> | | <i>Credit Hours/ Contact Hours</i> | <i>Enrollment</i> |
|-----------------------------------|-------|--|-------------------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

| <i>Fall Term - _____ (year)</i> | | <i>Credit Hours/ Contact Hours</i> | <i>Enrollment</i> |
|---------------------------------|-------|--|-------------------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

LAKE-SUMTER STATE COLLEGE
FACULTY EVALUATION – SERVICE TO THE COLLEGE
AND THE COMMUNITY

Name: _____ Date: _____

1. List college committees on which you have served; note chair responsibilities

2. List contributions to curriculum development and explain your role

3. List college functions you have helped plan or implement and explain your role

4. List clubs or activities you have advised or sponsored and explain your role

5. List grants you have pursued and explain their benefit to the college or to your professional growth

6. List other college activities in which you have participated and explain your role

7. Additional commentary on your service to the college

8. List speaking engagements, non-credit course instruction, and other professional interactions with the community

9. Additional commentary on your service to the community

Evaluator comments: _____

LAKE-SUMTER STATE COLLEGE
FACULTY EVALUATION – SERVICE TO THE PROFESSIONAL
AND PROFESSIONAL GROWTH

Name: _____

1. List memberships in professional organizations in your field; note leadership roles

2. List workshops, seminars, or conferences in your field that you have attended; note leadership roles

3. List research endeavors, publications, and presentations at professional meetings in your field

4. List honors or awards you have received from colleagues or professional organizations in your field

5. List academic coursework in your field taken at an accredited college or university

6. List non-credit courses taken or workshops attended that enhanced your professional growth

7. List certifications you have earned that are required for your field

8. List certifications you have earned for professional growth

9. Additional commentary on service to your professional and your professional growth

Evaluator comments: _____

**LAKE-SUMTER STATE COLLEGE
FACULTY EVALUATION – GENERAL DUTIES**

Name: _____

1. Instructor complies with requirements of weekly class/office procedures, schedule, student access, and other formal assignments.

Yes No

Comments: _____

2. Instructor maintains an instructional schedule consistent with the established college calendar work week and published schedule of classes.

Yes No

Comments: _____

3. Instructor communicates and interacts effectively and professionally with students, faculty, and staff in accordance with established college processes and procedures.

Yes No

Comments: _____

4. Instructor provides required institutional data (grades, formal reports, budget information, and so forth) and administrative paperwork (textbook orders, schedules, and so forth) in a timely manner.

Yes No

Comments: _____

5. Instructor abides by directions given by department chairs, deans, and other administrative supervisors related to conduct as an instructor.

Yes No

Comments: _____

6. Instructor cooperates with performance of additional duties involving urgent circumstances or legal mandates.

Yes No

Comments: _____

=====

Overall evaluation: (circle one) Satisfactory Unsatisfactory

Evaluator's signature: _____ Date: _____

Instructor's signature: _____ Date: _____

LAKE-SUMTER STATE COLLEGE
FACULTY EVALUATION
ANNUAL PROFESSIONAL DEVELOPMENT PLAN
ACADEMIC YEAR _____ - _____

Name: _____

Choose at least one goal for the academic year from each of the three areas designated in the evaluation; goals can be continuations of ongoing projects.

TEACHING EXCELLENCE

| <i>Goals</i> | <i>Outcome*</i> |
|--------------|-----------------|
| _____ | |
| _____ | |
| _____ | |
| _____ | |
| _____ | |

SERVICE TO THE COLLEGE OR THE COMMUNITY

| <i>Goals</i> | <i>Outcome*</i> |
|--------------|-----------------|
| _____ | |
| _____ | |
| _____ | |
| _____ | |
| _____ | |

SERVICE TO THE PROFESSION AND PROFESSIONAL GROWTH

| <i>Goals</i> | <i>Outcome*</i> |
|--------------|-----------------|
| _____ | |
| _____ | |
| _____ | |
| _____ | |
| _____ | |

**To be completed the following year*

Evaluator's signature: _____ Date: _____

Instructor's signature: _____ Date: _____



FACULTY LIBRARIAN EVALUATION

Faculty name: _____ Rank: _____

Department: _____ Evaluator: _____ Date: _____

All librarians shall be evaluated annually by the appropriate supervisor in the following three areas: Librarianship Excellence; Service to the College and the Community; and Service to the Profession and Professional Growth. Librarianship excellence may be evaluated as appropriate.

LIBRARIANSHIP EXCELLENCE

----- Ratings -----

5=Outstanding 4 = excellent

3 = satisfactory 2 =needs improvement

1 = not applicable

| No. | Duty or Performance Goal/Objective | Evaluation w/ Examples | Rating |
|-----|------------------------------------|------------------------|--------|
| | Based on position held* | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

Library Instruction Sessions Taught (attach sheet if applicable)

Additional evaluator comments: _____

Librarian's comments: _____

Evaluator's signature: _____ Date: _____

Librarian's signature: _____ Date: _____

**LAKE-SUMTER STATE COLLEGE
FACULTY LIBRARIAN EVALUATION – SERVICE TO THE COLLEGE
AND THE COMMUNITY**

Name: _____ **Date:** _____

1. List college committees on which you have served; note chair responsibilities

2. List contributions to library development and explain your role

3. List college functions you have helped plan or implement and explain your role

4. List clubs or activities you have advised or sponsored and explain your role

5. List grants you have pursued and explain their benefit to the college or to your professional growth

6. List other college activities in which you have participated and explain your role

7. Additional commentary on your service to the college

8. List speaking engagements, non-credit course instruction, and other professional interactions with the community

9. Additional commentary on your service to the community

Evaluator comments: _____

**LAKE-SUMTER STATE COLLEGE
FACULTY LIBRARIAN EVALUATION – SERVICE TO THE PROFESSION
AND PROFESSIONAL GROWTH**

Name: _____

1. List memberships in professional organizations in your field; note leadership roles

2. List workshops, seminars, or conferences in your field that you have attended; note leadership roles

3. List research endeavors, publications, and presentations at professional meetings in your field

4. List honors or awards you have received from colleagues or professional organizations in your field

5. List academic coursework in your field taken at an accredited college or university

6. List non-credit courses taken or workshops attended that enhanced your professional growth

7. List certifications you have earned that are required for your field

8. List certifications you have earned for professional growth

9. Additional commentary on service to your profession and your professional growth

Evaluator comments: _____

**LAKE-SUMTER STATE COLLEGE
FACULTY LIBRARIAN EVALUATION – GENERAL RESPONSIBILITIES**

Name: _____

- 1. Librarian complies with requirements of weekly library needs, schedule, student access, and other formal assignments.**

Yes No

Comments: _____

- 2. Librarian maintains a flexible schedule consistent with the established library work week functions.**

Yes No

Comments: _____

- 3. Librarian communicates and interacts effectively and professionally with students, faculty, and staff in accordance with established college processes and procedures.**

Yes No

Comments: _____

- 4. Librarian provides required institutional data (usage data, formal reports, budget information, and so forth) and administrative paperwork (materials orders, schedules, and so forth) in a timely manner.**

Yes No

Comments: _____

- 5. Librarian abides by directions given by administrative supervisors related to conduct as a Librarian.**

Yes No

Comments: _____

- 6. Librarian cooperates with performance of additional duties involving urgent circumstances or legal mandates.**

Yes No

Comments: _____

=====

IMPROVEMENT DEVELOPMENT PLAN

List below specific improvement goals or actions where improvement is needed for any Goal or Duty in Librarianship Excellence area which is rated below satisfactory; and/or any General Responsibility area rated as “No”.

| <u>Improvement or Development Action/Goal</u> | <u>Target Date for Completion</u> |
|---|-----------------------------------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

=====

Overall evaluation: (circle one) Satisfactory Unsatisfactory

Meeting Rank & Promotion Goals:
(circle one) On Target Below Target N/A

Evaluator’s signature: _____ Date: _____

Evaluator Supervisor’s signature _____ Date: _____

Librarian’s signature: _____ Date: _____

**LAKE-SUMTER STATE COLLEGE
FACULTY LIBRARIAN EVALUATION
ANNUAL PROFESSIONAL DEVELOPMENT PLAN
ACADEMIC YEAR _____ - _____**

Name: _____

Specify at least one development goal for the academic year for each of the three areas designated in the evaluation; goals can be continuations of ongoing projects.

LIBRARIANSHIP EXCELLENCE

Goals

*Outcome**

| | |
|-------|-------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

SERVICE TO THE COLLEGE OR THE COMMUNITY

Goals

*Outcome**

| | |
|-------|-------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

SERVICE TO THE PROFESSION AND PROFESSIONAL GROWTH

Goals

*Outcome**

| | |
|-------|-------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

**To be completed the following year*

Evaluator's signature: _____ Date: _____

Librarian's signature: _____ Date: _____

LSSC PERFORMANCE REVIEW OVERARCHING RATING INDICATORS

| EXEMPLARY/ OUTSTANDING | EXCEEDS EXPECTATIONS/ EXCELLENT | MEETS EXPECTATIONS/ SATISFACTORY | NEEDS IMPROVEMENT | UNSATISFACTORY | NOT APPRAISED/ NOT APPLICABLE |
|--|--|---|---|---|---|
| <p>Consistently delivers on more than the agreed upon duties/objectives and above the standards (quality & quantity)</p> <p>Creates and delivers truly extraordinary outputs and/or services</p> <p>Recognized as a professional or behavioral role model whom others turn to</p> <p>Inspires and teaches others to demonstrate excellent performance and Values</p> <p>Routinely rises to the unexpected needs of the team/group/department</p> | <p>Consistently delivers on duties/objectives to standards which contribute to dept/division or College success</p> <p>No coaching, follow-up or assistance necessary</p> <p>Demonstrates expected levels of technical/functional skills, job factors/competencies, Values</p> <p>Accomplishes frequently more than expected results</p> <p>Consistently meets and frequently completes other special tasks/duties (above job requirements) as requested</p> | <p>Frequently delivers on objectives or duties to standards which contribute to the dept/division or College success</p> <p>Requires some follow-up, coaching, and assistance</p> <p>Demonstrates basic expected levels of technical/functional skills, job factors/competencies, Values</p> <p>Contributions meet job requirements</p> | <p>Does not consistently deliver on duties or objectives</p> <p>Produces results that are below required/ standard levels</p> <p>Requires frequent or continuous follow-up, coaching, and assistance</p> <p>May have difficulty in one or more areas of technical/functional skills, job factors/ competencies, Values</p> <p>Overall contribution to team/group does not meet basic requirements</p> | <p>Performance relative to basic job requirements is unsatisfactory</p> <p>Often produces poor quality results or fails to meet output/service commitments</p> <p>Developmental needs in three or more Competencies/Job Factors or Values that are not offset by the same number of strengths</p> | <p>Experience with employee's performance is insufficient to assess performance – usually less than 90 days experience in the grade/level during the performance year</p> <p>OR</p> <p>Specific duty or behavior not observed/not applicable</p> |

Last

Updated:

12/8/10

Program Staff Assistant Athletics Position Duties Standards/Rubric

| Job Duty | Exemplary | Exceeds Expectations | Meets Expectations | Needs Improvement | Unsatisfactory |
|---|---|--|---|---|---|
| Manage the student-athlete admissions process | All student-athletes have completed admissions application, received student X-ID number; H.S. Graduation has been certified and advising appointments have been scheduled. Student-Athlete course schedules have been submitted for term registration. All schedules have been processed and copies of class schedules are on file. Any transfer student information has been received and copies of transcripts are on file. NJCAA Eligibility compliance files are complete. | All student-athletes have completed admissions application, received student X-ID number; H.S. Graduation has been certified and advising appointments have been scheduled. Student-Athlete course schedules have been submitted for term registration. Any schedules that have not been processed are due to student-athlete changes. Any transfer student information has been documented. | All student-athletes have completed admissions application and have received student X-ID number. 50 of 60 student-athletes have been scheduled for advising appointments by departmental deadline. 50 of 60 class schedules have been processed by the 1 st day to register. (Employee informs supervisor of possible problems) | Four or Five student-athlete admissions applications have not been processed or are incomplete; eleven or twelve student-athletes have not been scheduled for advising appointments. Eleven or twelve class schedules have not been processed by the 1 st day to register. (Employee fails to inform supervisor) | Six or more student-athletes do not have admissions requirements completed or applications are incomplete. More than twelve student-athletes have not been scheduled for advising appointments. More than twelve class schedules have not been processed by the 1 st day to register. (Employee fails to inform supervisor). |
| Track and inventory all athletic related admissions information for State reporting | All student-athlete files are completed and Audit file has been certified, two weeks prior to departmental deadline. | All student-athlete files are completed and Audit file has been certified, one week prior to departmental deadline. | One or two student-athlete files are incomplete and audit file is one or two days past departmental deadline. Supervisor is made aware of incomplete files and past due departmental deadline. NJCAA/FCCAA required deadline submission date is met. | Three or Four student-athlete files are incomplete and audit file is three or four days past departmental deadline. Employee does not notify supervisor but audit file can be completed by NJCAA/FCCAA required date. | Four or more student-athlete files are incomplete and audit file is four or five days past departmental deadline; Employee does not notify supervisor and audit file will not be completed by NJCAA/FCCAA required date. |
| Coordinate and prepare textbook orders | Employee has met with Bookstore manager to review textbook orders | Employee has met with Bookstore manager to review textbook orders | Employee has met with Bookstore manager to review textbook orders | Four (4) or five (5) additional meetings to review textbook | Six (6) or more additional meetings with Bookstore |

| Job Duty | Exemplary | Exceeds Expectations | Meets Expectations | Needs Improvement | Unsatisfactory |
|--|---|--|---|--|---|
| | for upcoming term and prepares text book orders based upon student-athlete class schedule, three weeks prior to term start date. Textbook orders are complete and accurate. | for upcoming term and prepares text book orders based upon student-athlete class schedule, three weeks prior to term start date. Averages one (1) or two (2) additional meetings with bookstore. Employee informs supervisor of potential problems with textbook orders. | for upcoming term and prepares text book orders based upon student-athlete class schedule, three weeks prior to term start date. Averages three (2) or three (3) additional meetings with bookstore. Employee informs supervisor of potential problems with textbook orders. | orders for upcoming term and is one week past due in preparing text book orders based upon student-athlete class schedule. Employee fails to inform supervisor of past due date and problems with textbook orders. Six (6) or seven (7) textbooks were not ordered but can still be received prior to the first week of classes. | Manager to review textbook orders for upcoming term and is one week past due in preparing text book orders based upon student-athlete class schedule. Employee fails to inform supervisor of past due date and textbook order is now late. All textbook orders are not completed, more than seven (7) textbooks have not been ordered and those students will not be prepared for the first day of classes. |
| Monitor distribution of textbooks and complete appropriate inventories | Employee informs the supervisor of one (1) or (2) potential incomplete/inaccurate distributions or missing textbooks, prior to date of distribution. Previously notified the bookstore of change. Books will be distributed <u>prior</u> to the first day of classes. | No more than two (2) or three (3) incomplete/inaccurate distributions or missing textbooks. Employee informs supervisor and has notified the bookstore of change. Books will be distributed <u>on</u> the first day of classes. | No more than four (4) incomplete/inaccurate distributions or missing textbooks. Employee fails to inform supervisor but did notify the bookstore of potential change; could take one additional day to complete distribution(s). Notifies supervisor, upon confirmation with bookstore. | More than (4) incomplete distributions or missing textbooks. Employee fails to inform supervisor and bookstore of any changes. Distribution(s) could take up to one week. | More than (7) incomplete distributions or missing textbooks. Employee fails to inform the supervisor and bookstore of any changes. Distribution(s) could take a more than a week to complete. |

| LSSC SERVICE STANDARDS and KEY BEHAVIORAL INDICATORS | <i>Exemplary</i> | <i>Exceeds Expectations</i> | <i>Meets Expectations</i> | <i>Needs Improvement</i> | <i>Unsatisfactory</i> |
|---|---|--|---|---|--|
| RESPECTFUL | | | | | |
| Treat people the way they want to be treated | Always demonstrates an ability and willingness to treat others with respect (the way they would want to be treated) When interacting with others demonstrates a high level of active listening skills and responsiveness skills. | Consistently demonstrates an ability and willingness to treat others with respect (the way they would want to be treated). Demonstrates active listening and responsiveness skills when with others. | Generally demonstrates a willingness to treat others with respect (the way they would want to be treated) but does not consistently demonstrate active listening and responsiveness skills. | Struggles to demonstrate a willingness to treat others with respect (the way they would want to be treated) as well as demonstrate active listening and responsiveness skills and abilities. | Demonstrates an inability to treat others with respect (the way they would want to be treated) or engage in active listening and responsiveness skills. |
| Be courteous | Always demonstrates a polite and considerate manner and demonstrates the best of professionalism when interacting with others. Is always friendly, caring, and honors personal space. | Consistently demonstrates a polite and considerate manner when interacting with others. Is always friendly, caring, and honors personal space. | Generally demonstrates a polite and considerate manner when interacting with others as well as a friendly, caring demeanor that honors personal space. | Struggles to demonstrate a polite and considerate manner when interacting with others or a friendly, caring demeanor that honors personal space. | Demonstrates an inability to display a polite and considerate manner when interacting with others or a friendly, caring demeanor that honors personal space. |
| Respect lines of authority in communication, procedures, policies, | Always demonstrates attention to, consideration for and understanding of the connections between College procedures, policies, and lines of authority in communication. | Consistently demonstrates attention to, consideration for and understanding of the connections between College procedures, policies, and lines of authority in communication. | Generally demonstrates attention to, consideration for and understanding of the connections between College procedures, policies, and lines of authority in communication. | Struggles to demonstrate attention to, consideration for and understanding of the connections between College procedures, policies, and lines of authority in communication. | Demonstrates an inability to give attention to, consideration for and understanding of the connections between College procedures, policies, and lines of authority in communication. |
| Appreciate differences | Always demonstrates an appreciation and respect for individual's differences. Is an outspoken advocate for diversity through the inclusion of disabilities, socio-economic status, ethnicity, gender, age, religion, orientation, values, and cultures. | Consistently demonstrates an appreciation and respect for individual's differences. Advocates for treating everyone the same regardless of disabilities, socio-economic status, ethnicity, gender, age, religion, orientation, values, and cultures. | Generally demonstrates an appreciation and respect for individual's differences, treating everyone the same regardless of disabilities, socio-economic status, ethnicity, gender, age, religion, orientation, | Struggles to demonstrate an understanding of the importance of appreciating and respecting individual differences including those with differing abilities/disabilities, socio-economic status, | Demonstrates an inability to understand the importance of appreciating and respecting individual differences including those with differing abilities/disabilities, socio-economic status, |

| | | | | | |
|--|--|--|--|---|--|
| | | | values, and cultures. | ethnicity, gender, age, religion, orientation, values, and cultures. | ethnicity, gender, age, religion, orientation, values, and cultures. |
| COMPETENT | | | | | |
| Utilize knowledge and skills effectively | Always demonstrates exceptional knowledge and skills in even the most complex aspects of their job responsibilities. | Consistently demonstrates better than average knowledge and skills in all aspects of their job responsibilities. | Generally demonstrates adequate knowledge and skills required to complete their job responsibilities. | Struggles to demonstrate the application of knowledge and skills required to complete their job responsibilities. | Demonstrates an inability to apply the knowledge and skills required to complete their job responsibilities. |
| Utilize resources (time, energy, money) effectively. | Always demonstrates the skill to expend resources (time, energy, money) wisely and in ways that allow the individual to be productive. | Consistently demonstrates the skill to expend their resources (time, energy, money) wisely and in ways that allow the individual to be productive. | Generally demonstrates adequate skill to expend resources (time, energy, money) wisely and in ways that allow the individual to be productive. | Struggles to demonstrate the ability to expend resources (time, energy, money) wisely and in ways that allow the individual to be productive. | Demonstrates an inability to expend resources (time, energy, money) wisely and as a result is unproductive. |
| Exercise active problem-solving and informed decision-making | Always demonstrates outstanding problem-solving skills and is able to handle complex problems creatively. | Consistently demonstrates good problem-solving skills and is usually able to handle complex problems. | Generally demonstrates adequate problem-solving skills but may require assistance to handle complex or unusual problems. | Struggles to solve routine problems satisfactorily. Typically requires assistance with complex problems. | Demonstrates an inability to solve routine problems satisfactorily. Always needs assistance with complex problems. |
| Be efficient and reliable | Always demonstrates efficiency and reliability. | Consistently demonstrates efficiency and reliability | Generally demonstrates adequate efficiency and reliability but occasionally needs assistance/ coaching. | Struggles in order to maintain efficiency and reliability and frequently requires assistance/ coaching. | Demonstrates an inability or lack of skills necessary to attain efficiency and reliability. |
| Follow processes | Always follows processes consistently. | Consistently follows processes. | Generally demonstrates the ability to follow processes consistently. | Struggles with following processes. | Demonstrates an inability to follow processes. |
| RESPONSIVE | | | | | |
| Act in a timely manner | Always submits completed work on-time. Commits time as necessary to fulfill responsibilities of position in a competent manner. Manages work in an orderly and efficient manner. Operates with a clear sense of priorities. Shows a high capacity to adapt quickly to change, shortening the response time of processes and systems. | Consistently acts in a timely manner. | Generally acts in a timely manner. | Struggles to act in a timely manner and may need assistance/coaching to do so. | Demonstrates an inability to act in a timely manner. |
| Demonstrate accessibility (in | Always demonstrates accessibility (in person, by | Consistently demonstrates accessibility (in person, by | Generally demonstrates accessibility (in person, | Struggles to demonstrate accessibility (in person, | Demonstrates an inability to achieve or maintain |

| | | | | | |
|--|---|--|--|---|--|
| person, by phone, by email) | phone, by email). | phone, by email). | by phone, by email). | by phone, by email). | accessibility (in person, by phone, by email). |
| Be dependable by following-up and following-thru on promises | Always demonstrates dependability by following-up and following-thru on promises. | Consistently demonstrates dependability by following-up and following-thru on promises. | Generally demonstrates dependability by following-up and following-thru on promises. | Struggles to demonstrate dependability by following-up and following-thru on promises. | Demonstrates an inability to be dependable by following-up and following-thru on promises. |
| Be informative by providing accurate information and solutions | Always informative by providing accurate information and solutions. | Consistently informative by providing accurate information and solutions. | Generally informative by providing accurate information and solutions. | Struggles to provide accurate information and solutions. | Demonstrates an inability to provide accurate information and solutions. |
| COLLABORATIVE | | | | | |
| Seek and provide help to accomplish goals | Always demonstrates a willingness to help others, always willing to persevere to resolve problems, and always provides a supportive, positive work environment that promotes productivity. | Consistently demonstrates a willingness to help others, always willing to help resolve problems, and consistently provides a supportive, positive work environment that promotes productivity. | Generally is a team player who helps others to resolve problems, and provides a supportive, positive work environment that promotes productivity. | Struggles to demonstrate cooperativeness and prefers to work alone when working to accomplish goals. | Demonstrates an inability to work in a team environment to accomplish goals. |
| Engage stakeholders for input | Always demonstrates exceptional skills in engaging stakeholders to communicate their needs and input. | Consistently demonstrates skill in engaging stakeholders to communicate their needs and input. | Generally demonstrates adequately skill in engaging stakeholders to communicate their needs and input. | Struggles to demonstrate the ability to engage stakeholders to communicate their needs and input. | Demonstrates an inability to engage stakeholders to communicate their needs and input. |
| Communicate interdepartmentally | Always demonstrates the ability to listen effectively and respond clearly and directly both verbally and in writing. Always interacts with other departments in a helpful and informative manner. | Consistently demonstrates the ability to listen and respond verbally and in writing. Consistently Interacts with other departments in a helpful and informative manner. | Generally demonstrates adequate ability to listen and respond verbally and in writing. Usually can interact with other departments in an informative manner. | Struggles to communicate verbally or in writing and exhibits difficulty when interacting with other departments in an informative manner. | Demonstrates an inability to communicate verbally, in writing, and/or with other departments. |
| Build relationships and win-win partnerships with honesty, trust | Always establishes rapport and builds relationships that foster win-win partnerships and promote honesty and trust. | Consistently builds relationships that foster win-win partnerships and promote honesty and trust. | Generally demonstrates the ability to build relationships that foster win-win partnerships and promote honesty and trust. | Struggles to build relationships that foster win-win partnerships and promote honesty and trust. | Demonstrates an inability to build relationships that foster win-win partnerships and promote honesty and trust. |
| MANAGER AND SUPERVISOR ABILITY ITEM 1 | | | | | |

| | | | | | |
|--|---|---|--|---|---|
| Communicating | Always demonstrates the following abilities: Exhibits the ability to clearly articulate thoughts, effectively utilizes diplomacy and tact, manages assumptions and personal filters, is able to gauge an audience and adjust communication appropriately to said audience. Communication always adds value and is appropriate for the setting. Communication efforts are effective in cultivating professional relationships across the College at all levels of the organization. Communication style highlights the use of active/reflective listening. | Consistently demonstrates the following abilities: Builds constructive and effective professional relationships; uses diplomacy and tact; manages assumptions and personal filters; communicates articulately and concisely verbally and in writing considering the type of audience; understands and uses active/reflective listening. | Generally demonstrates the following abilities with occasional need for assistance/coaching: Builds constructive and effective professional relationships; uses diplomacy and tact; articulately communicates verbally and concisely in writing; understands and uses active/reflective listening. | Struggles to develop professional relationships with others, to communicate verbally and/or in writing, and/or to use active/reflective listening skills in their daily communications with others. | Demonstrates an inability to develop professional relationships with others, to communicate verbally and/or in writing, and/or to use active/reflective listening skills in their daily communications with others. |
| Conducts meetings incorporating and highlighting Service Excellence | Always conducts meetings and carries out projects with service excellence in mind. | Consistently conducts meetings or carries out projects with service excellence in mind. | Generally conducts meetings or carries out projects with service excellence in mind. | Struggles to incorporate the ideals of service excellence when conducting meetings or working on projects. | Demonstrates an inability to incorporate the ideals of service excellence when conducting meetings or working on projects. |
| Is prepared with information in meetings | Always is well prepared with information and knowledge of the subject. | Consistently is well prepared with information and knowledge of the subject. | Generally is well prepared with information and knowledge of the subject. | Struggles to be prepared with information and knowledge of the. | Demonstrates an inability to be prepared with information and knowledge of the subject. |
| Recognizes those who demonstrate the “WOW” factor of Service Excellence. | Always recognizes those who demonstrate the “WOW” factor of service excellence. | Consistently recognizes those who demonstrate the “WOW” factor of service excellence. | Generally recognizes those who demonstrate the “WOW” factor of service excellence. | Struggles to recognize those who demonstrate the “WOW” factor of service excellence. | Demonstrates an inability to recognize those who demonstrate the “WOW” factor of service excellence. |

| | | | | | |
|---|--|---|--|--|--|
| MANAGER AND SUPERVISOR ABILITY ITEM 2 | | | | | |
| Support of Service Excellence | Always supports all aspects of the College's Vision, Mission, and Service Excellence Standards. | Consistently supports aspects of the College's Vision, Mission and Service Excellence Standards. | Generally supports aspects of the College's Vision, Mission and Service Excellence Standards. | Struggles to show support for the College's Vision, Mission and Service Excellence Standards. | Demonstrates an inability to show support for the College's Vision, Mission and Service Excellence Standards. |
| Leadership in moving LSSC to a culture of Service Excellence | Always demonstrates leadership and is enthusiastically engaged in building a culture of Service Excellence at LSSC. | Consistently demonstrates leadership and is engaged in building a culture of Service Excellence at LSSC. | Generally is engaged in building a culture of Service Excellence at LSSC. | Struggles to show engagement in building a culture of Service Excellence at LSSC. | Demonstrates an inability to show engagement in building a culture of Service Excellence at LSSC. |
| Models LSSC's Service Excellence Philosophy: "We inspire confidence through every interaction to empower lives and build futures by providing a caring and supportive learning environment" | Always demonstrates the ability to build outstanding working relationships, inspires staff and/or coworkers to excel in service excellence, leads by example, and helps to create a cooperative work environment conducive to excellence in service, and enthusiastically promotes service excellence initiatives. | Consistently demonstrates the ability to build strong working relationships, inspires staff and/or coworkers to engage in service excellence, leads by example, and helps to create a cooperative work environment conducive to excellence in service, and promotes service excellence initiatives. | Generally demonstrates the ability to work together to engage in service excellence, helps to build cooperative work environments conducive to excellence in service, is a team player, and helps to promote service excellence initiatives. | Struggles to demonstrate the ability to work together to engage in service excellence, to help build a cooperative work environment conducive to excellence in service, to act as a team player, and to help promote service excellence initiatives. | Demonstrates an inability to work together to engage in service excellence, to help build a cooperative work environment conducive to excellence in service, to act as a team player, and to promote service excellence initiatives. |
| MANAGER AND SUPERVISOR ABILITY ITEM 3 | | | | | |
| Modeling Service Excellence Standards | Always models all aspects of the College's Vision, Mission and service standards. | Consistently models all aspects of the College's Vision, Mission and service standards. | Generally models all aspects of the College's Vision, Mission and service standards. | Struggles to model all aspects of the College's Vision, Mission and service standards. | Demonstrates an inability to model all aspects of the College's Vision, Mission and service standards. |
| Holds self and others accountable to the LSSC's Service Excellence Standards | Always holds self and others accountable to the LSSC's Service Excellence Standards. | Consistently holds self and others accountable to the LSSC's Service Excellence Standards. | Generally holds self and others accountable to the LSSC's Service Excellence Standards. | Struggles to hold self and others accountable to the LSSC's Service Excellence Standards. | Demonstrates an inability to hold self and others accountable to the LSSC's Service Excellence Standards. |

| ADMINISTRATOR JOB FACTORS/COMPETENCIES STANDARDS | | | | |
|--|---|---|--|--|
| <i>Exemplary</i> | <i>Exceeds Expectations</i> | <i>Meets Expectations</i> | <i>Needs Improvement</i> | <i>Unsatisfactory</i> |
| Knowledge | | | | |
| Demonstrates complete and accurate knowledge of job; work is always of the highest quality; continually strives to stay informed; requires minimal instruction and direction; always assures that work is done right, thoroughly or precisely. | Regularly demonstrates the following abilities: Possesses full range of knowledge and skills necessary to effectively perform the job; seeks opportunities to increase knowledge; is attentive to details and produces work with consistent accuracy and professional display; when necessary seeks information or instruction to complete work. | Demonstrates the following abilities with occasional need for assistance/coaching: Possesses basic knowledge and skills necessary to effectively perform the job; strives to increase knowledge with assistance; is attentive to details and produces work with consistent accuracy; may occasionally require coaching and direction to complete work. | Possesses only basic job skills required for the job; makes little effort to increase knowledge; requires regular instruction, direction and oversight to complete routine tasks; inconsistently produces accurate work; shows concern when errors are made but does not make efforts to fix them. | Lacks skills required for the role; makes no effort to increase knowledge; requires extensive instruction, direction and oversight; produces work that contains notable and careless errors; demonstrates lack of concern for getting details right. |
| Communication | | | | |
| Clearly articulates thoughts and adds value in a variety of settings and styles; cultivates professional relationships across the College and at all levels of the organization; makes frequent use of active/reflective listening. | Regularly demonstrates the following abilities: Builds constructive and effective professional relationships; uses diplomacy and tact; manages assumptions and personal filters; communicates articulately and concisely verbally and in writing considering the type of audience; understands and uses active/reflective listening. | Demonstrates the following abilities with occasional need for assistance/coaching : Builds constructive and effective professional relationships; uses diplomacy and tact; communicates articulately and concisely verbally and in writing; understands and uses active/reflective listening. | Inconsistent ability to develop professional relationships with others; often inarticulate; does not consistently demonstrate diplomacy and tact; communication skills are weak or inconsistent. | Lacks the interpersonal skills to develop productive professional working relationships; unable to deliver appropriate messages verbally and in writing; does not demonstrate effective communication and listening skills. |
| Decision Making | | | | |
| Consistently takes into account the needs of all stakeholders; always weighs ramifications of decisions; demonstrates an ability to effectively influence key decision makers. | Regularly demonstrates the following abilities: Involves others appropriately when making decisions; exercises different decision styles as appropriate to situation; invites others' opinions and ideas when weighs alternative decisions before taking action; can be relied on to | Demonstrates the following abilities with occasional need for assistance/coaching: Involves others appropriately when making decisions; weighs alternative decisions before taking action; uses decision making tools and solicits appropriate level of input before making make sound decisions. | At times, does not appropriately involve others when making decisions; fails to foresee the consequences of decisions; sometimes makes inappropriate decisions. | Avoids decision making situations; fails to gather necessary information for decision making; regularly makes inappropriate decisions. |

| ADMINISTRATOR JOB FACTORS/COMPETENCIES STANDARDS | | | | |
|---|--|---|---|---|
| <i>Exemplary</i> | <i>Exceeds Expectations</i> | <i>Meets Expectations</i> | <i>Needs Improvement</i> | <i>Unsatisfactory</i> |
| | make sound decisions. | | | |
| Leadership & Motivation | | | | |
| Intuitively knows when to use a team approach or to act independently; delegates authority in a way that empowers employees; gives effective feedback, even when the message is difficult to deliver; monitors progress and proactively removes barriers to help employees accomplish goals. Able to identify when others are struggling; openly and willingly shares information and resources; regularly seeks to engage others in a constructive learning process. Sought out by others due to unrivaled willingness to help; always displays self-control and a positive attitude, even when handling difficult people or situations; always demonstrates genuine interest and empathy. | Regularly demonstrates the following abilities: discerns when to use a team or individual approach; appropriately delegates authority; regularly provides feedback regarding both strengths and development needs; provides adequate resources for employees to accomplish their goals. Promotes a positive and supportive environment; provides additional information, resources and support to others as needed; provides appropriate feedback to encourage growth and success. Is easy to approach and talk to; pleasant and able to maintain composure when faced with difficult situations; puts others at ease; builds trust and rapport; displays genuineness; is a good listener using paraphrasing and open question techniques. | Demonstrates the following abilities with occasional need for assistance/coaching: discerns when to use a team or individual approach; appropriately delegates authority; provides feedback regarding both strengths and development needs; provides adequate resources for employees to accomplish their goals. Promotes a positive and supportive environment; provides additional information, resources and support to others as needed; provides appropriate feedback to encourage growth and success. Is approachable to talk with; pleasant and works to maintain composure when faced with difficult situations; strives to make others at ease; works to build trust and establish rapport; displays genuineness; good listening techniques. | Micro-manages or takes a hands-off approach to many employee activities; does not appropriately delegate duties and responsibilities; has not fully established working relationships based on trust; inconsistently or inappropriately provides feedback to employees. Inconsistent ability to identify when others are struggling; feedback lacks a positive and constructive tone; may become frustrated when others are learning. May be seen as unapproachable in certain situations; often demonstrates negative or disingenuous behaviors; actions and non-verbal responses may be inconsistent or inappropriate to the situation. | Does not manage employee activities; does not hold self accountable for employee and team performance; fails to provide employees with the resources needed to accomplish goals, does not provide appropriate feedback. Not willing to provide support or assistance to others; withholds information and resources; lacks empathy when others are learning. Unapproachable; is unpleasant, pessimistic and difficult to be around; is abrasive when interacting with others; creates tension; projects attitude of superiority and finds fault with others; is dismissive of others concerns or ideas. |
| College & Community Relations | | | | |
| Sought out by others due to unrivaled willingness to help; always displays self-control and a positive attitude, even when handling | Regularly demonstrates the following abilities: Is easy to approach and talk to; open and o maintains | Demonstrates the following abilities with occasional need for assistance/coaching: Is easy to approach and talk to; | May be seen as unapproachable in certain situations; often demonstrates negative or | Unapproachable; is unpleasant, pessimistic and difficult to be around; is abrasive when interacting |

| ADMINISTRATOR JOB FACTORS/COMPETENCIES STANDARDS | | | | |
|---|--|---|--|--|
| <i>Exemplary</i> | <i>Exceeds Expectations</i> | <i>Meets Expectations</i> | <i>Needs Improvement</i> | <i>Unsatisfactory</i> |
| difficult people or situations; always demonstrates genuine interest and empathy Consistently knows when extra effort is necessary and intuitively reacts to customer needs; displays a high level of dedication in everyday situations; goes above and beyond to ensure needs are met; regularly surprises customers with unexpected levels of service. | composure when faced with difficult situations; puts others at ease; builds trust and rapport; displays genuineness; is a good listener. Actively seeks a variety of information and view points to understand and anticipate customer needs; shows initiative and meets expectations; resolves issues; takes ownership and is accountable. | pleasant and able to maintain composure when faced with difficult situations; puts others at ease; strives to build trust and rapport; displays genuineness; displays effective listening techniques. Seeks information to understand and deliver on customer needs; shows initiative and takes action to ensure expectations are met and issues resolved; typically takes ownership and is accountable. | disingenuous behaviors; actions and non-verbal responses may be inconsistent or inappropriate to the situation. Inconsistently solicits appropriate information to assist with customer needs; does not always follow through to fulfill customer expectations; often does not accept responsibility for actions and decisions. | with others; creates tension; projects attitude of superiority and finds fault with others; is dismissive of others concerns or ideas. Does not demonstrate the ability to gather information and take action to ensure customer expectations are met; often fails to deliver on customer needs; does not exhibit initiative or take ownership in responding to requests. |
| Resource Management | | | | |
| Proactively plans budgetary and financial efforts; maximizes existing financial resources and partners appropriately to identify new funding sources when needed; effectively manages College and departmental resources following financial goals, policies and procedures. | Regularly demonstrates the following abilities: Utilizes College resources wisely; is not wasteful; maintains, plans, and projects for budgetary and financial needs; manages budget and related paperwork within policy guidelines; uses financial physical and human resources effectively. | Demonstrates the following abilities with occasional need for assistance/coaching: keeps within established budget guidelines; identifies ways to effectively utilize resources; manages budget and completes paperwork per policy guidelines; demonstrates overall the ability to use resources effectively | May be wasteful; has difficulty keeping within established budget guidelines; provides inconsistent management of financial resources; regularly submits budget and accounting paperwork incorrectly or late. | Does not keep within established budget guidelines; fails to use College resources wisely; decisions result in fiscal misuse or waste; demonstrates improper utilization of financial resources; does not follow financial policies and procedures. |
| Professional Development | | | | |
| Seeks a higher degree of professional excellence; immediately conveys a positive impression; exhibits unrivaled ethical behavior; demonstrates unwavering self-assurance and competence; dedicated to the student, the profession and the organization | Regularly demonstrates the following abilities: Polite, respectful and courteous; words and actions are appropriate for the situation; exhibits confidence and capability; is polished and poised; exhibits behaviors consistent with College standards of conduct; conforms to proper standards of professional dress. | Demonstrates the following abilities with occasional need for assistance/coaching: courteous and respectful in most situations; seeks opportunities to increase professionalism; identifies and exercises some appropriate models and examples to develop skills and knowledge necessary to excel in the professional setting; increasing awareness of office protocol and standards of professional | May be seen as lacking in confidence and competence; at times words and actions are not appropriate for the professional setting; occasionally displays a lack of respect towards others; inconsistent in appearance and standards of professional dress. | Shows a poor image of the College; often acts or communicates in an inappropriate and disrespectful manner; lacks competence and motivation to develop skills and grow professionally; does not conform to professional standards of dress. |

| ADMINISTRATOR JOB FACTORS/COMPETENCIES STANDARDS | | | | |
|---|-----------------------------|---------------------------|--------------------------|-----------------------|
| <i>Exemplary</i> | <i>Exceeds Expectations</i> | <i>Meets Expectations</i> | <i>Needs Improvement</i> | <i>Unsatisfactory</i> |
| | | dress. | | |

| MANAGERIAL & TECHNICAL JOB FACTORS/COMPETENCIES STANDARDS | | | | |
|---|---|---|--|--|
| <i>Exemplary</i> | <i>Exceeds Expectations</i> | <i>Meets Expectations</i> | <i>Needs Improvement</i> | <i>Unsatisfactory</i> |
| Professional Knowledge | | | | |
| Demonstrates complete and accurate knowledge of job; work is always of the highest quality; continually strives to stay informed; requires minimal instruction and direction; always assures that work is done right, thoroughly or precisely.. | Regularly demonstrates the following abilities: Possesses full range of knowledge and skills necessary to effectively perform the job; seeks opportunities to increase knowledge; is attentive to details and produces work with consistent accuracy and professional display; when necessary seeks information or instruction to complete work. | Demonstrates the following abilities with occasional need for assistance/coaching: Possesses basic knowledge and skills necessary to effectively perform the job; strives to increase knowledge with assistance; is attentive to details and produces work with consistent accuracy; may occasionally require coaching and direction to complete work. | Possesses only basic job skills required for the job; makes little effort to increase knowledge; requires regular instruction, direction and oversight to complete routine tasks; inconsistently produces accurate work; shows concern when errors are made but does not make efforts to fix them. | Lacks skills required for the role; makes no effort to increase knowledge; requires extensive instruction, direction and oversight; produces work that contains notable and careless errors; demonstrates lack of concern for getting details right. |
| Organizational Skills | | | | |
| Work consistently exceeds acceptable standards by a significant degree; extremely punctual and reliable; excellent follow-through; routinely meets commitments. | Can be counted on to deliver on commitments and provide quality work; regularly sets sound priorities; ensures timely follow-through; is reliable and punctual; work is regularly completed in a consistent and timely manner | Is enhancing the ability to determine priorities to consistently deliver on projects and tasks; developing skills still to ensure commitments are met in a timely manner; needs occasional support/guidance in determining priorities and setting schedules. | Work is not consistently completed in a timely manner; often misses or is late with appointments, deadlines and other commitments; does not consistently follow-through. | Projects and tasks are not completed in a timely manner; is not present and punctual; lacks commitment and follow-through. |
| Supervisory Effectiveness | | | | |
| Intuitively knows when to use a team approach or to act independently; delegates authority in a way that empowers employees; gives effective feedback, even | Regularly demonstrates the following abilities: discerns when to use a team or individual approach; appropriately delegates | Demonstrates the following abilities with occasional need for assistance/coaching: discerns when to use a team or individual approach; | Micro-manages or takes a hands-off approach to many employee activities; does not appropriately delegate duties and | Does not manage employee activities; does not hold self accountable for employee and team performance; fails to provide employees with |

| MANAGERIAL & TECHNICAL JOB FACTORS/COMPETENCIES STANDARDS | | | | |
|---|--|--|---|--|
| <i>Exemplary</i> | <i>Exceeds Expectations</i> | <i>Meets Expectations</i> | <i>Needs Improvement</i> | <i>Unsatisfactory</i> |
| when the message is difficult to deliver; monitors progress and proactively removes barriers to help employees accomplish goals. Able to identify when others are struggling; openly and willingly shares information and resources; regularly seeks to engage others in a constructive learning process. Sought out by others due to unrivaled willingness to help; always displays self-control and a positive attitude, even when handling difficult people or situations; always demonstrates genuine interest and empathy. | authority; regularly provides feedback regarding both strengths and development needs; provides adequate resources for employees to accomplish their goals. Promotes a positive and supportive environment; provides additional information, resources and support to others as needed; provides appropriate feedback to encourage growth and success. Is easy to approach and talk to; pleasant and able to maintain composure when faced with difficult situations; puts others at ease; builds trust and rapport; displays genuineness; is a good listener using paraphrasing and open question techniques. | appropriately delegates authority; provides feedback regarding both strengths and development needs; provides adequate resources for employees to accomplish their goals. Promotes a positive and supportive environment; provides additional information, resources and support to others as needed; provides appropriate feedback to encourage growth and success. Is approachable to talk with; pleasant and works to maintain composure when faced with difficult situations; strives to make others at ease; works to build trust and establish rapport; displays genuineness; good listening techniques. | responsibilities; has not fully established working relationships based on trust; inconsistently or inappropriately provides feedback to employees. Inconsistent ability to identify when others are struggling; feedback lacks a positive and constructive tone; may become frustrated when others are learning. May be seen as unapproachable in certain situations; often demonstrates negative or disingenuous behaviors; actions and non-verbal responses may be inconsistent or inappropriate to the situation. | the resources needed to accomplish goals, does not provide appropriate feedback. Not willing to provide support or assistance to others; withholds information and resources; lacks empathy when others are learning. Unapproachable; is unpleasant, pessimistic and difficult to be around; is abrasive when interacting with others; creates tension; projects attitude of superiority and finds fault with others; is dismissive of others concerns or ideas. |
| Decision Making | | | | |
| Consistently takes into account the needs of all stakeholders; always weighs ramifications of decisions; demonstrates an ability to effectively influence key decision makers. | Regularly demonstrates the following abilities: Involves others appropriately when making decisions; exercises different decision styles as appropriate to situation; invites others' opinions and ideas when weighs alternative decisions before taking action; can be relied on to make sound decisions. | Demonstrates the following abilities with occasional need for assistance/coaching: Involves others appropriately when making decisions; weighs alternative decisions before taking action; uses decision making tools and solicits appropriate level of input before making make sound decisions. | At times, does not appropriately involve others when making decisions; fails to foresee the consequences of decisions; sometimes makes inappropriate decisions. | Avoids decision making situations; fails to gather necessary information for decision making; regularly makes inappropriate decisions. |
| Initiative & Application | | | | |
| Successfully alters activities to suit demands of new or changing requirements; embraces and readily accepts change; adapts easily to new situations; comfortably refocuses when priorities shift; successfully diffuses stressful situations. | Regularly adapts to change; understands and uses change management concepts/techniques; seeks challenges; seeks information or counsel on how to optimize change; regularly demonstrates | Typically open to change; strives to adapt to new situations; demonstrates ability to seamlessly shift priorities; learning to understand change management and how to appropriate techniques; | Focuses on barriers; inflexible and is reluctant to shift priorities or make adjustments when change is necessary; may become defensive or irritated when times are tough. | Demonstrates a high level of resistance to change; is negative and incapable of shifting priorities when faced with changing situations; unable and unwilling to adapt to change. |

| MANAGERIAL & TECHNICAL JOB FACTORS/COMPETENCIES STANDARDS | | | | | |
|---|--|---|---|---|---|
| <i>Exemplary</i> | | <i>Exceeds Expectations</i> | <i>Meets Expectations</i> | <i>Needs Improvement</i> | <i>Unsatisfactory</i> |
| | | flexibility and positive attitude when faced with new situations; regularly handles stressful situations calmly and professionally. | needs occasional help to understand and handle the impact of change; learning to adapt to unusual stressful situations. | | |
| Communication | | | | | |
| Clearly articulates thoughts and adds value in a variety of settings and styles; cultivates professional relationships across the College and at all levels of the organization; makes frequent use of active/reflective listening. | | Regularly demonstrates the following abilities: Builds constructive and effective professional relationships; uses diplomacy and tact; manages assumptions and personal filters; communicates articulately and concisely both verbally and in writing considering the type of audience; understands and uses active/reflective listening. | Demonstrates the following abilities with occasional need for assistance/coaching : Builds constructive and effective professional relationships; uses diplomacy and tact; communicates articulately and concisely verbally and in writing; understands and uses active/reflective listening. | Inconsistent ability to develop professional relationships with others; often inarticulate; does not consistently demonstrate diplomacy and tact; communication skills are weak or inconsistent. | Lacks the interpersonal skills to develop productive professional working relationships; unable to deliver appropriate messages verbally and in writing; does not demonstrate effective communication and listening skills. |
| Quality of Work | | | | | |
| Consistently knows when extra effort is necessary and intuitively reacts to customer needs; displays a high level of dedication in everyday situations; goes above and beyond to ensure needs are met; regularly surprises customers with unexpected levels of service. always assures that work is done right, thoroughly or precisely.. | | Regularly seeks actively the information to understand and anticipate customer needs; shows initiative and takes action to ensure expectations are met and issues resolved; takes ownership and is accountable. is attentive to details and produces work with consistent accuracy; rarely may need instruction and direction to complete work even with new tasks or duties. | Demonstrates general proficiency in seeking information from others to ensure customer needs are met; learning more about College services to best assist customers; demonstrates frequently responsiveness. Delivers quality work with occasional problems or errors and learns from such. Needs occasional guidance in new tasks or duties. | Inconsistently solicits appropriate information to assist with customer needs; does not always follow through to fulfill customer expectations; often does not accept responsibility for actions and decisions. Inconsistently produces accurate work; shows concern when errors are made but does not make efforts to fix them | Does not demonstrate the ability to gather information and take action to ensure customer expectations are met; often fails to deliver on customer needs; does not exhibit initiative or take ownership in responding to requests. Requires extensive instruction, direction and oversight; produces work that contains notable and careless errors; demonstrates lack of concern for getting details right |
| Community Contact | | | | | |
| Sought out by others due to unrivaled willingness to help; always displays self-control and a positive attitude, even when handling difficult people or situations; always demonstrates genuine interest and empathy | | Regularly demonstrates the following abilities: Is easy to approach and talk to; open and maintains composure when faced with difficult situations; puts others at ease; builds trust and rapport; | Demonstrates the following abilities with occasional need for assistance/coaching: Is easy to approach and talk to; pleasant and able to maintain composure when faced with difficult situations; puts others | May be seen as unapproachable in certain situations; often demonstrates negative or disingenuous behaviors; actions and non-verbal responses may be | Unapproachable; is unpleasant, pessimistic and difficult to be around; is abrasive when interacting with others; creates tension; projects attitude of superiority and finds fault with others; is |

| MANAGERIAL & TECHNICAL JOB FACTORS/COMPETENCIES STANDARDS | | | | | |
|---|--|--|--|---|--|
| <i>Exemplary</i> | | <i>Exceeds Expectations</i> | <i>Meets Expectations</i> | <i>Needs Improvement</i> | <i>Unsatisfactory</i> |
| Consistently knows when extra effort is necessary and intuitively reacts to customer needs; displays a high level of dedication in everyday situations; goes above and beyond to ensure needs are met; regularly surprises customers with unexpected levels of service. | | displays genuineness; is a good listener. Actively seeks a variety of information and view points to understand and anticipate customer needs; shows initiative and meets expectations; resolves issues; takes ownership and is accountable. | at ease; strives to build trust and rapport; displays genuineness; displays effective listening techniques. Seeks information to understand and deliver on customer needs; shows initiative and takes action to ensure expectations are met and issues resolved; typically takes ownership and is accountable. | inconsistent or inappropriate to the situation. Inconsistently solicits appropriate information to assist with customer needs; does not always follow through to fulfill customer expectations; often does not accept responsibility for actions and decisions. | dismissive of others concerns or ideas. Does not demonstrate the ability to gather information and take action to ensure customer expectations are met; often fails to deliver on customer needs; does not exhibit initiative or take ownership in responding to requests. |

| PROFESSIONAL: ADMINISTRATIVE, CRAFT & TRADES JOB FACTORS/COMPETENCIES STANDARDS | | | | |
|--|---|---|--|--|
| <i>Exemplary</i> | <i>Exceeds Expectations</i> | <i>Meets Expectations</i> | <i>Needs Improvement</i> | <i>Unsatisfactory</i> |
| Knowledge, Skill, Ability | | | | |
| Demonstrates complete and accurate knowledge of job; work is always of the highest quality; continually strives to stay informed; requires minimal instruction and direction; always assures that work is done right, thoroughly or precisely; routinely adapts or uses new skills and knowledge to meet new or changing job requirements. | Regularly demonstrates the following abilities: Possesses full range of knowledge and skills necessary to effectively perform the job; seeks opportunities to increase knowledge; is attentive to details and produces work with consistent accuracy and professional display; when necessary seeks information or instruction to complete work; shows readiness to adapt or use new skills and knowledge to meet new or changing job requirements. | Demonstrates the following abilities with occasional need for assistance/coaching: Possesses basic knowledge and skills necessary to effectively perform the job; strives to increase knowledge with assistance; is attentive to details and produces work with consistent accuracy; may occasionally require coaching and direction to complete work; shows readiness to adapt or use new skills and knowledge to meet new or changing job requirements. | Possesses only basic job skills required for the job; makes little effort to increase knowledge; requires regular instruction, direction and oversight to complete routine tasks; inconsistently produces accurate work; shows concern when errors are made but does not make efforts to fix them. | Lacks skills required for the role; makes no effort to increase knowledge; requires extensive instruction, direction and oversight; produces work that contains notable and careless errors; demonstrates lack of concern for getting details right. |
| Team Focus/Collaboration | | | | |
| Establishes rapport with everyone; unrivaled willingness to assist others; fosters development of a common vision; is viewed by others as an ambassador for the department and the College. | Regularly demonstrates the following abilities: Works well with others; promotes teamwork and collaboration within and outside of the department; invites input from others; openly requests feedback; makes a valuable contribution to team/College objectives | Demonstrates the following abilities with an occasional need for assistance/coaching: Completes designated cooperative tasks as assigned. Acts in accordance with department/unit objectives. Works toward win-win solutions. Keeps coworkers informed of changes in processes/procedures that could impact their jobs. Constructively responds to suggestions and feedback. Does not blame others. Follows department and college procedures; completes forms completely and accurately in support of college goals, efficiency and effectiveness. | Is often reluctant to help others or share information; shows a lack of cooperation on team projects; appears more interested in promoting self interests over the good of the department. | Unwilling to cooperate; has consistently failed to achieve goals as a team member; develops road blocks to working as a team. |

| PROFESSIONAL: ADMINISTRATIVE, CRAFT & TRADES JOB FACTORS/COMPETENCIES STANDARDS | | | | |
|---|--|---|---|---|
| <i>Exemplary</i> | <i>Exceeds Expectations</i> | <i>Meets Expectations</i> | <i>Needs Improvement</i> | <i>Unsatisfactory</i> |
| Communication | | | | |
| Exemplary | Exceeds Expectations | Meets Expectations | Needs Improvement | Unsatisfactory |
| Clearly articulates thoughts and adds value in a variety of settings and styles; cultivates professional relationships across the College and at all levels of the organization; makes frequent use of active/reflective listening. | Regularly demonstrates the following abilities: Builds constructive and effective professional relationships; uses diplomacy and tact; manages assumptions and personal filters; communicates articulately and concisely both verbally and in writing considering the type of audience; understands and uses active/reflective listening. | Listens to and understands explanations, directions and expressions of need, whether from clients, superiors or co-workers. Clearly expresses verbally or in writing needs, explanations and directions to others as required. Provides constructive feedback, engages in follow-up, keeps others informed, and obtains information from others as needed to perform work effectively. | Inconsistent ability to develop professional relationships with others; often inarticulate; does not consistently demonstrate diplomacy and tact; listening skills weak or erratic; verbal and written communication skills are weak or inconsistent. | Lacks the interpersonal skills to develop productive professional working relationships; unable to deliver appropriate messages verbally and in writing; does not demonstrate effective communication and listening skills. |
| Reliability & Productivity | | | | |
| Work consistently exceeds acceptable standards by a significant degree; extremely punctual and reliable; excellent follow-through; routinely meets commitments. | Can be counted on to deliver on commitments and provide quality work; regularly sets sound priorities; ensures timely follow-through; is reliable and punctual; work is regularly completed in a consistent and timely manner | Is enhancing the ability to determine priorities to consistently deliver on projects and tasks; developing skills still to ensure commitments are met in a timely manner; needs occasional support/guidance in determining priorities and setting schedules. | Work is not consistently completed in a timely manner; often misses or is late with appointments, deadlines and other commitments; does not consistently follow-through. | Projects and tasks are not completed in a timely manner; is not present and punctual; lacks commitment and follow-through. |
| Innovativeness | | | | |
| Consistently takes into account the roles and needs of other employees' jobs in relation to one's job in support of College goals; identifies improvement areas; volunteers to try or pilot innovative techniques/processes; acts as an innovative role model to others | Regularly demonstrates the following abilities: to learn more about job and role of job and others' jobs in support of College goals; shows continuous improvement; accepts and welcomes feedback; takes action on suggestions without pressure; engages the interest of others in identifying improvement areas or ideas; volunteers ideas to the right people. | Demonstrates the following abilities with occasional need for assistance/coaching: works to learn more about job and role of job in support of College goals; shows desire for continuous improvement; accepts and welcomes feedback; takes action on suggestions without pressure; engages the interest of others in identifying improvement areas or ideas; volunteers ideas to the right people. | At times, does not appropriately involve others when making decisions; fails to foresee the consequences of decisions; sometimes makes inappropriate decisions. | Avoids decision making situations; fails to gather necessary information for decision making; regularly makes inappropriate decisions. |

| PROFESSIONAL: ADMINISTRATIVE, CRAFT & TRADES JOB FACTORS/COMPETENCIES STANDARDS | | | | |
|--|--|---|--|---|
| <i>Exemplary</i> | <i>Exceeds Expectations</i> | <i>Meets Expectations</i> | <i>Needs Improvement</i> | <i>Unsatisfactory</i> |
| Interpersonal Skills | | | | |
| Successfully alters activities to suit demands of new or changing requirements; embraces and readily accepts change; adapts easily to new situations; comfortably refocuses when priorities shift; successfully diffuses stressful situations. | Regularly adapts to change; understands and uses change management concepts/techniques; seeks challenges; seeks information or counsel on how to optimize change; regularly demonstrates flexibility and positive attitude when faced with new situations; regularly handles stressful situations calmly and professionally. Regularly: is easy to approach and talk to; displays genuineness, pleasant and able to maintain composure when faced with difficult situations; puts others at ease; strives to build trust and rapport; displays genuineness; displays effective listening techniques. | Typically open to change; strives to adapt to new situations; demonstrates ability to seamlessly shift priorities; learning to understand change management and how to appropriate techniques; needs occasional help to understand and handle the impact of change; learning to adapt to unusual stressful situations. Typically is easy to approach and talk to; displays genuineness, pleasant and able to maintain composure when faced with difficult situations; puts others at ease; strives to build trust and rapport; displays genuineness; displays effective listening techniques. | Focuses on barriers; inflexible and is reluctant to shift priorities or make adjustments when change is necessary; may become defensive or irritated when times are tough. | Demonstrates a high level of resistance to change; is negative and incapable of shifting priorities when faced with changing situations; unable and unwilling to adapt to change. |