

**I. EMPLOYEE INFORMATION**

Employee Name	Employee ID Number
Job Title	Department
Supervisor/Reviewer	Review Period <input type="checkbox"/> Goals Only – within probationary period or From: ___ / ___ / ___ To: ___ / ___ / ___

**II. CORE COMPETENCIES – ALL EMPLOYEES**

CATEGORY	RATING	COMMENTS AND EXAMPLES
<b>Action Oriented</b> Takes on new opportunities and tough challenges with a sense of urgency, high energy, and enthusiasm. Confirms understanding of tasks prior to engaging in next steps.	<input type="checkbox"/> Needs Improvement <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Exceeds Expectations	
<b>Resilient</b> Rebounds from setbacks and adversity when facing difficult situations. Uses lessons learned from challenges or failures as a way to change their approach moving forward.	<input type="checkbox"/> Needs Improvement <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Exceeds Expectations	
<b>Communicates Effectively</b> Develops and delivers multi-mode communications that convey a clear understanding of the unique needs of different audiences.	<input type="checkbox"/> Needs Improvement <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Exceeds Expectations	
<b>Instills Trust</b> Gains the confidence and trust of others through honesty, integrity, authenticity, and consistently accurate work product.	<input type="checkbox"/> Needs Improvement <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Exceeds Expectations	
<b>Values Differences</b> Recognizes the value that different perspectives bring to UHCL.	<input type="checkbox"/> Needs Improvement <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Exceeds Expectations	

**III. JOB-SPECIFIC PERFORMANCE CRITERIA – ALL EMPLOYEES**

CATEGORY	RATING	COMMENTS AND EXAMPLES
<b>Collaborates</b> Builds partnerships and works collaboratively with others to meet shared objectives.	<input type="checkbox"/> Needs Improvement <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Exceeds Expectations	
<b>Customer Focus</b> Builds strong customer relationships and delivers customer-centric solutions.	<input type="checkbox"/> Needs Improvement <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Exceeds Expectations	
<b>Optimizes Work Processes</b> Utilizes effective and efficient processes to get things done, with a focus on continuous improvement.	<input type="checkbox"/> Needs Improvement <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Exceeds Expectations	

**IV. PERFORMANCE CRITERIA SPECIFIC TO SUPERVISORS** (only complete if employee is a Supervisor)

CATEGORY	RATING	COMMENTS AND EXAMPLES
<b>Balances Stakeholders</b> Anticipates and balances the needs of multiple stakeholders.	<input type="checkbox"/> Needs Improvement <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Exceeds Expectations	
<b>Cultivates Innovation</b> Creates new and better ways for UHCL to be successful.	<input type="checkbox"/> Needs Improvement <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Exceeds Expectations	
<b>Develops Talent</b> Develops people to meet both their career goals and UHCL’s goals. Uses and champions available systems and resources to support skill development of employees.	<input type="checkbox"/> Needs Improvement <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Exceeds Expectations	
<b>Strategic Mindset</b> Sees ahead to future possibilities and translates them into breakthrough strategies that will influence current and future outcomes for UHCL.	<input type="checkbox"/> Needs Improvement <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Exceeds Expectations	

V. GOAL STATUS (September 1 <sup>st</sup> of previous year – August 31 <sup>st</sup> of current year)		
GOAL	STATUS	COMMENTS
	<input type="checkbox"/> Complete <input type="checkbox"/> Incomplete – some progress made <input type="checkbox"/> Incomplete – no progress <input type="checkbox"/> Cancelled	
	<input type="checkbox"/> Complete <input type="checkbox"/> Incomplete – some progress made <input type="checkbox"/> Incomplete – no progress <input type="checkbox"/> Cancelled	
	<input type="checkbox"/> Complete <input type="checkbox"/> Incomplete – some progress made <input type="checkbox"/> Incomplete – no progress <input type="checkbox"/> Cancelled	
	<input type="checkbox"/> Complete <input type="checkbox"/> Incomplete – some progress made <input type="checkbox"/> Incomplete – no progress <input type="checkbox"/> Cancelled	
	<input type="checkbox"/> Complete <input type="checkbox"/> Incomplete – some progress made <input type="checkbox"/> Incomplete – no progress <input type="checkbox"/> Cancelled	

**Goals for the new assessment period** (a minimum of two new/recurring goals are **required**)

The employee and supervisor should agree on performance goals for the coming assessment period. While planning goals for the next assessment period, incorporate factors/elements that are critical for development, changing job requirements and/or career growth.

**Training/Professional Development:**

- At a minimum, all employees should have one Professional Development goal listed below. Available resources include ASCEND Learning Programs, Hawk Power Hour, and/or Organizations/Associations.

When applicable, add how this goal ties back to the [UHCL Strategic Plan](#).

GOAL (what will be accomplished?)	DUE DATE (within Fiscal Year)	ACTION ITEMS (step goals or actions needed to accomplish goal)

**VI. SPECIAL RECOGNITION**

This space provides the opportunity to comment on individual achievement above and beyond role requirements. These can include awards received, exceeding customer expectations, exemplary performance in goal completion, special projects, involvement in campus committees, etc.

**Additional Comments:**

SUPERVISOR COMMENTS	EMPLOYEE COMMENTS

**Signatures:** (must be completed prior to submission to Human Resources)

All signatures are required. A signature does not constitute as agreement with the assessment but serves as confirmation that this meeting took place.

\_\_\_\_\_  
Date of assessment meeting

\_\_\_\_\_  
Employee

\_\_\_\_\_  
Date Signed

\_\_\_\_\_  
Supervisor

\_\_\_\_\_  
Date Signed