



**Employee Relations Organizations Meeting
September 24th – 10am to 11am
Zoom Meeting**

Representatives Present:

ERC: Amber Carter, April Thompson, Jackie Cotton, Katora Jones, Linda Johnson, Lyncie Crawford, Nathan Tipton, Vickie Christian, Jackie Fox, Andrea Briggs, Jean Perdicaris, Nury Magana, Joyce Hamilton, Robyn Taylor, Jasmine Bowles, Janette Smith

ESC: Blake Dingman, Daniel Hutchinson, Kimberlee Norwood, Stephanie Breuer, Vanessa Baker, Venus Claxton, Dorothea Owens

Guests: Damon Davis, Debbie Jackson, Debbie Long, Rebekka Freeman, Edwin Jeffres

Minutes Secretary: Kimberlee Norwood

Representatives Absent: Yin Su, Kaining Zhi, Lisa, Hall, Felicia Washington

Meeting Agenda and Minutes

10:00am Welcome – Debbie Long

10:05am Benefits Open Enrollment – Debbie Jackson

Annual Open Enrollment Period October 1-16, 2020 – time to sign up or to make changes. Virtual benefits fair this year. If not making changes, no Edison action required. Medical 2.8% increase, Cigna Dental increase 3%. PayFlex is changing to Optum Bank for flexible spending account (FSA). Every year you MUST re-enroll in your FSA. Recommended spend funds before 2020 end. Up to \$500 will roll over but will not be available until July 2021.

10:10am New Performance Evaluation form and expectations – Damon Davis

Performance Review Instruction Form – Equity, Diversity, and Inclusion has been added.

Detailed summary form – added the Equity, Diversity, and Inclusion. Defined key elements of performance in more detail and aligned with performance evaluation.

Summary form – only form that is sent to HR. Exceeds expectations and Unsatisfactory, both require supporting documentation. If unsatisfactory, HR should have previous documentation of corrections efforts or documented conversations with the employee. Adaptability and flexibility have been removed. Service and relationships are emphasized.

Key elements guide – gives examples in each area of accomplishment for each level of achievement, i.e. exceeds. Also, give separate examples for supervisors and for staff.

Performance evaluations will be for regular employees hired before June 30, 2020. July 1, 2020 and after employees will be on the probationary performance evaluation. Will be on the website and fillable on the HR website. SharePoint will still be used for submitting evaluations.

10:45am Announcements

ESC Pharmacy New faculty, Wenkuan Xin, PhD, Assistant Professor (Non-Tenure Track) started in Pharmaceutical Sciences on August 25, 2020.

ERC AFSA The Southern Association of Colleges and Schools Commission on Colleges (SACSCOC) accreditation of UTHSC completed its virtual site review Tuesday, 9-15, of the Knoxville, Nashville, & Chattanooga campuses and Tuesday & Wednesday, 9-22 & 9-23, of the Memphis campus. There are 73 standards that require a response. UTHSC was compliant in all but one. In other words, UTHSC achieved a perfect score. The chair stated that the average range of issues for campuses is 4 to 8. The Chair of the committee stated he had done 13 or so onsite visits and this is the only time he has seen only 1 recommendation. This perfect score represents hundreds of hours that many in Academic, Faculty, and Student Affairs (AFSA) spent during the last 18 months in preparation for this accreditation visit. Accreditation, which occurs every 5 years, is mandated for every university receiving federal funding that is Financial Aid. UTHSC should be very proud of this amazing accomplishment!

ESC Dentistry September 1, 2020, 60 days away from groundbreaking for addition to dental building. Filtration system updated to MERV 14 rating as of yesterday, one of the first in the country to receive this system able to filter COVID-19.

ESC Facilities Everyone is back in the office in facilities. Contract bids for elevator replacement for Dunn, Hyman, and 930 Madison are being accepted. Next will be repair bids for 920 Madison, Van Fleet, and Wittenborg elevators.

Annual Open Enrollment

October 1-16, 2020

Want to keep the same
benefits in 2021?

**NO Edison
ACTION
REQUIRED!**



What's New for 2021?

Medical and Dental premiums

- Medical premiums will increase by 2.8%
- Cigna Dental will increase by 3%

New Flexible Spending Account Vendor

- Changing to Optum Bank
- Re-enrollment required for FSA accounts each year!
- New cards will be sent in Dec
- Recommend using all 2020 funds by the end of the year
- Carry over funds (up to \$500) will not be available until July 2021.

Annual Open Enrollment Newsletter



The Benefits Administration forwarded the Newsletter early September.



It can be found on the [Edison website](#) for all AETP information and links.

Edison log in



Instructions for Edison Log-in:



[Handout for instructions.](#)



[Edison Log on video instructions](#)

Questions?



The University of Tennessee

Performance Review Instruction Form

Purpose of Performance Reviews

The performance review is intended to be a fair and balanced assessment of an employee's performance. It is a time for the supervisor and employee to review the performance of the last year, give and receive feedback, clarify job duties, explain management's expectations, and set goals for the coming year. To accomplish a fair and balanced assessment, management must provide the employee an opportunity to express his/her opinions about the employment relationship. Even though the employee's past performance is reviewed, an essential component is planning for the next year.

Essential Elements of Performance Reviews

1. **Supervisor reviews the employee's job duties for evaluation (using the PD or job description).**
The purpose of this review is to identify the job duties to be evaluated. The supervisor may also review the performance review from the previous year to see if the employee's goals and objectives were met.
2. **Supervisor and employee discuss the performance review.** The performance review process must include one-on-one discussion between the supervisor and employee with both parties being full participants. The supervisor may ask the employee to complete a self-assessment before the review.
3. **Timeliness.** Performance reviews should cover the calendar year and should be submitted during the first quarter of the following year.
4. **Documentation.** The summary sheet and any required statements/documentation should be sent to your campus's/institute's Human Resources office. Review your campus procedures for required documentation. Any additional documentation that either the supervisor or employee wants included in the employee's permanent personnel file may also be attached.

The Performance Review Summary Form

The Performance Review Summary Form is designed to record the results of the employee's evaluation. During the performance review meeting with the employee, use the Performance Review Summary Form to record an overall evaluation in the areas of accomplishments; service and relationships; accountability and dependability; equity, diversity and inclusion; and decision making/problem solving. The ratings on this form will be entered into IRIS and may be used in determining merit pay.

Key Elements of Performance Review Summary

- **Accomplishments** – Evaluate the employee's success in performing identified duties/areas of responsibilities. Use the PD or departmental goals and objectives to identify specific duties/areas of responsibilities.
- **Service & Relationships** – Evaluate the employee's success in the areas of customer service, communication, interpersonal skills, civility, and teamwork.
- **Accountability & Dependability** – Evaluate the employee's success in contributing to the effectiveness of the department and the overall mission of the university. It is important to note that time off approved under FLMA may not be considered in the evaluation.
- **Equity, Diversity & Inclusion** – Evaluate the employee to the extent which the employee treats others with fairness, dignity, and respect, fosters inclusiveness, values individual and group differences (e.g. age, gender, religion, race, ethnicity, sexual orientation, gender identity, nationality, veterans, disability, culture, position, and others), takes efforts to enhance diversity, inclusion and cultural humility, and contributes to departmental and organizational unit diversity strategic goals.
- **Decision Making & Problem Solving** – Evaluate the employee's success in making decisions, following safe work practices, and complying with the university's policies and federal, state, and local laws. If the employee performs a managerial function, evaluate the employee on his/her abilities to manage human and fiscal resources effectively, developing goals which support the university's and unit's mission, and setting appropriate examples for employee behavior.

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Performance Review Instruction Form

Ratings

Expectations should be specific, measurable, attainable, realistic, and timely. An employee should be evaluated based on how well he/she has met the known expectations of his/her position.

Evaluate the employee using the following options:

Consistently Exceeds Achieves Expectations

Example: Employee consistently completes tasks early or on time and will consistently seek ways to help others complete tasks and/or accepts additional tasks.

Fully Achieves & Occasionally Exceeds Expectations

Example: Employee consistently completes tasks early or on time and will occasionally seek ways to help others complete tasks and/or accepts additional tasks.

Fully Achieves Expectations

Example: Employee consistently completes tasks on time or in a timely manner with no intervention.

Sometimes Achieves Expectations

Example: Employee sometimes does/sometimes does not complete tasks on time and may often have to be reminded to complete the tasks.

Unsatisfactory/Rarely Achieves Expectations

Example: Employee rarely completes tasks on time.

Other Forms and Retention of Performance Review Form

Please review your campus's/institute's procedures for any additional detailed forms necessary to complete the performance review. These procedures should also include retention requirements.

Questions

If the employee disagrees with the evaluation, he/she should discuss his/her concerns with the supervisor.

Supervisors may click on [this link](#) for access to forms and other information. On-line performance review courses may be accessed by going to the [Employee and Organizational Development website](#).

Questions

Questions about performance reviews may be forwarded to your local Human Resources office. Attending a training session on how to conduct an effective performance review may be scheduled by contacting your local Human Resources-Training office:

Chattanooga	(423) 425-4221
Health Science Center (Memphis)	(901) 448-5600
Knoxville Area	(865) 946-8847
Martin	(731) 881-7845
Space Institute	(931) 393-7226

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Performance Review Summary Form (to be completed for all staff and forwarded to Human Resources)

Employee Name: _____	IRIS Personnel Number: _____
Department: _____	Position Title: _____
Review Completed By: _____	Reviewer's Personnel Number: _____
Review Period: _____ to _____	

Key Elements:

- 1. Accomplishments** - the extent to which the employee meets expectations in performing the job functions of his/her position as defined in documentation such as the PDQ, annual work plan, etc.
 - Consistently Exceeds Expectations (supporting statement/documentation required)
 - Fully Achieves and Occasionally Exceeds Expectations
 - Fully Achieves Expectations
 - Sometimes Achieves Expectations
 - Unsatisfactory/Rarely Achieves Expectations (supporting documentation required)
- 2. Service & Relationships** - the extent to which the employee's behaviors are directed toward fostering positive working relationships in a civil workplace, respect for one's fellow workers, and cooperation with students, customers, and visitors.
 - Consistently Exceeds Expectations (supporting statement/documentation required)
 - Fully Achieves and Occasionally Exceeds Expectations
 - Fully Achieves Expectations
 - Sometimes Achieves Expectations
 - Unsatisfactory/Rarely Achieves Expectations (supporting documentation required)
- 3. Accountability & Dependability** - the extent to which the employee contributes to the effectiveness of the department and the overall mission of the University. (NOTE: Time off approved under FMLA may not be considered.)
 - Consistently Exceeds Expectations (supporting statement/documentation required)
 - Fully Achieves and Occasionally Exceeds Expectations
 - Fully Achieves Expectations
 - Sometimes Achieves Expectations
 - Unsatisfactory/Rarely Achieves Expectations (supporting documentation required)
- 4. Equity, Diversity and Inclusion** - the extent to which the employee treats others with fairness, dignity, and respect, fosters inclusiveness, values individual and group differences (e.g. age, gender, religion, race, ethnicity, sexual orientation, gender identity, nationality, veterans, disability, culture, position, and others), takes efforts to enhance diversity, inclusion and cultural humility, and contributes to departmental and organizational unit diversity strategic goals.
 - Consistently Exceeds Expectations (supporting statement/documentation required)
 - Fully Achieves and Occasionally Exceeds Expectations
 - Fully Achieves Expectations
 - Sometimes Achieves Expectations
 - Unsatisfactory/Rarely Achieves Expectations (supporting documentation required)
- 5. Decision Making & Problem Solving** - the extent to which the employee makes sound and logical job-related decisions that are in the best interest of the University. (As applicable, this element includes developing and managing human and fiscal resources within the framework of University policy.)
 - Consistently Exceeds Expectations (supporting statement/documentation required)
 - Fully Achieves and Occasionally Exceeds Expectations
 - Fully Achieves Expectations
 - Sometimes Achieves Expectations
 - Unsatisfactory/Rarely Achieves Expectations (supporting documentation required)

TOTAL POINTS: _____

Employee Name: _____ IRIS Personnel No: _____

<u>RATING</u>		<u>TOTAL POINTS</u>
Consistently Exceeds Expectations	=	23 - 25
Fully Achieves and Occasionally Exceeds Expectations	=	19 - 22
Fully Achieves Expectations	=	15 - 18
Sometimes Achieves Expectations	=	10 - 14
Unsatisfactory/Not Eligible for Across the Board Increase (Performance Improvement Plan Required)	=	9 or less

Final PR Rating: _____

1. Goals and Objectives have been developed and discussed with employee? Yes No
2. Job Duties and Performance Expectations have been discussed with employee? Yes No
3. Appropriate corrective action has been discussed with employee? Yes No NA
4. My supervisor has informed me of the importance of regularly checking my work and personal information that is recorded in IRIS.

Supervisor's Comments: (This section may be used as documentation for the "Unsatisfactory" ratings.)

Employee's Comments: (Employees may provide additional comments to be retained with this document in the personnel file.)

By signing below, I acknowledge that I have participated in the review process and have received a copy of the review.

(1) _____
Supervisor's Signature Date

(2) _____
Dept. Head/Director's Signature Date
(To be reviewed before employee's signature.)

(3) _____
Employee's Signature Date

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Goals & Objectives Form

Employee Name: _____

Personnel Number: _____

Department: _____

Position Title: _____

Review Completed By: _____

Review Period: _____ to _____

- The Goals & Objectives should include both departmental goals and plans for personal and professional development.
- The time frame indicates when the goal should be accomplished.
- Evaluation indicates how accomplishment will be measured.

	Goals and Objectives	Time Frame	Evaluation
1			
2			
3			
4			
5			

The University of Tennessee
Performance Review Detail Form

Employee Name: _____ **Personnel Number:** _____
Department: _____ **Position Title:** _____
Review Completed By: _____ **Review Period:** _____ to _____

Complete this form as back-up documentation to assist you in completing the Summary Sheet. The categories are grouped to match the categories in the Summary Sheet. For each item, choose the response that most closely matches your views of the employee's performance.

Accomplishments

1. **Attainment of Goals** - the extent to which the employee determines goals and makes efforts to reach those goals.

- Rarely Achieves
- Sometimes Achieves
- Fully Achieves
- Meets and Occasionally Exceeds
- Consistently Exceeds

**Comments/
Examples:**

2. **Use of Resources** - the extent to which the employee is a good steward of University resources and maximizes the tools available to them.

- Rarely Achieves
- Sometimes Achieves
- Fully Achieves
- Meets and Occasionally Exceeds
- Consistently Exceeds

**Comments/
Examples:**

3. **Deadlines** - the extent to which the employee adheres to stated and unstated deadlines.

- Rarely Achieves
- Sometimes Achieves
- Fully Achieves
- Meets and Occasionally Exceeds
- Consistently Exceeds

**Comments/
Examples:**

4. **Initiative** - the extent to which the employee has the ability to assess and initiate things independently.

- Rarely Achieves
- Sometimes Achieves
- Fully Achieves
- Meets and Occasionally Exceeds
- Consistently Exceeds

**Comments/
Examples:**

Service & Relationships

1. **Customer Service** - the extent to which the employee recognizes the importance of customer satisfaction by providing students, other staff, and the general public with prompt and accurate information in a respectful and helpful manner.

- Does not
- Does

**Comments/
Examples:**

Performance Review Detail Form (Page 2)

2. Communication & Interpersonal Skills - the extent to which the employee is respectful of management, co-workers, staff, students and the general public.

- Does not
- Does

**Comments/
Examples:**

3. Listening Skills – the extent to which the employee accurately receives and interprets messages in the communication process.

- Rarely Achieves
- Sometimes Achieves
- Fully Achieves
- Meets and Occasionally Exceeds
- Consistently Exceeds

**Comments/
Examples:**

4. Teamwork – the extent to which the employee successfully collaborates with others to accomplish departmental and University goals.

- Rarely Achieves
- Sometimes Achieves
- Fully Achieves
- Meets and Occasionally Exceeds
- Consistently Exceeds

**Comments/
Examples:**

Accountability and Dependability (Note: Time off approved under FMLA may not be considered)

1. Attendance – the extent to which the employee can be depended upon to report to work promptly each day.

- Rarely Achieves
- Sometimes Achieves
- Fully Achieves
- Meets and Occasionally Exceeds
- Consistently Exceeds

**Comments/
Examples:**

2. Follow-through - the extent to which the employee continues an action or task to its conclusion.

- Rarely Achieves
- Sometimes Achieves
- Fully Achieves
- Meets and Occasionally Exceeds
- Consistently Exceeds

**Comments/
Examples:**

3. Working Independently – the extent to which the employee takes ownership and does not require constant assistance or supervision to complete that task(s).

- Rarely Achieves
- Sometimes Achieves
- Fully Achieves
- Meets and Occasionally Exceeds
- Consistently Exceeds

**Comments/
Examples:**

Performance Review Detail Form (Page 3)

Equity, Diversity, and Inclusion – the extent to which the employee is willing to learn new techniques and/or tasks apply them to his/her job.

1. Equity – the extent to which the employee treats others equitably and respects individual differences.

- Rarely Achieves
- Sometimes Achieves
- Fully Achieves
- Meets and Occasionally Exceeds
- Consistently Exceeds

**Comments/
Examples:**

2. Diversity – the extent to which the employee invites diverse ideas.

- Rarely Achieves
- Sometimes Achieves
- Fully Achieves
- Meets and Occasionally Exceeds
- Consistently Exceeds

**Comments/
Examples:**

3. Inclusion – the extent to which the employee appropriately connects with others and interacts with different people.

- Rarely Achieves
- Sometimes Achieves
- Fully Achieves
- Meets and Occasionally Exceeds
- Consistently Exceeds

**Comments/
Examples:**

Decision Making/Problem Solving

1. Decision Making – the extent to which the employee can be relied upon to make sound, logical decisions.

- Rarely Achieves
- Sometimes Achieves
- Fully Achieves
- Meets and Occasionally Exceeds
- Consistently Exceeds

**Comments/
Examples:**

2. Solution Driven – the extent to which the employee prevents or solve problems.

- Rarely Achieves
- Sometimes Achieves
- Fully Achieves
- Meets and Occasionally Exceeds
- Consistently Exceeds

**Comments/
Examples:**

Performance Review Detail Form (Page 4)

3. Compliance – the extent to which the employee follows University policies and Federal, State, and Local laws.

- Rarely Achieves
- Sometimes Achieves
- Fully Achieves
- Meets and Occasionally Exceeds
- Consistently Exceeds

**Comments/
Examples:**

4. Safety – the extent to which the employee follows safe working practices.

- Rarely Achieves
- Sometimes Achieves
- Fully Achieves
- Meets and Occasionally Exceeds
- Consistently Exceeds

**Comments/
Examples:**

If employee performs a managerial function, please complete the Manager/Supervisor evaluation section:

1. Manages and develops human resources effectively.

- Does not
- Does

**Comments/
Examples:**

2. Promotes personal and professional development of employees.

- Rarely Achieves
- Sometimes Achieves
- Fully Achieves
- Meets and Occasionally Exceeds
- Consistently Exceeds

**Comments/
Examples:**

3. Uses fiscal resources in a responsible manner.

- Does not
- Does

**Comments/
Examples:**

4. Develops plans and goals which support the University's and unit's mission.

- Rarely Achieves
- Sometimes Achieves
- Fully Achieves
- Meets and Occasionally Exceeds
- Consistently Exceeds

**Comments/
Examples:**

Performance Review Detail Form (Page 5)

5. Encourages creativity and innovation in others.

- Rarely Achieves
- Sometimes Achieves
- Fully Achieves
- Meets and Occasionally Exceeds
- Consistently Exceeds

**Comments/
Examples:**

6. Sets appropriate example for employee behavior.

- Rarely Achieves
- Sometimes Achieves
- Fully Achieves
- Meets and Occasionally Exceeds
- Consistently Exceeds

**Comments/
Examples:**

7. Makes appropriate hiring decisions.

- Does not
- Does

**Comments/
Examples:**

8. Resolves problems in a constructive manner.

- Does not
- Does

**Comments/
Examples:**

Performance Review Detail Form (Page 6)

9. **Reviews employees' performance and provides formal evaluations annually.**

- Does not
- Does

**Comments/
Examples:**

General Comments:

(3) _____
Employee's Signature Date

(1) _____
Supervisor's Signature Date

(2) _____
Dept. Head/Director's Signature Date
(To be reviewed prior to employee's signature).

Key Elements Guide

The UTHSC Performance Evaluation Tool is designed to provide feedback to staff regarding their performance for the calendar year. There are five key elements to be evaluated during this process. Examples of performance standards for each category are listed below. While these are not exhaustive, they provide concepts and ideas that support the designated ratings.

ACCOMPLISHMENTS - the extent to which the employee meets expectations in performing the job functions of his/her position as defined in documentation such as the PDQ, annual work plan, etc.

Consistently Exceeds Expectations	<ul style="list-style-type: none"> • Achieved goals that others have failed. • Achieves goals, then looks for more. • The employee consistently beat deadlines for their own work and stay abreast of deadlines for their department. • Employee is consistently proactive and anticipates the needs of the department prior to potential problems arising and bring to supervisor approval. For example: Always monitors and forecast supplies for ebbs and flows to ensure the department always has an adequate amount of supplies on hand without creating a surplus. • Work reflects maximum innovative use of time and resources to consistently surpass expectations and improve operations.
Fully Achieves and Occasionally Exceeds Expectations	<ul style="list-style-type: none"> • Overcomes frustrating circumstances to achieve goals. • Juggles various goals and achieves most of them. • Does not get thrown by tough situations. • Does not let everyday problems deflect focus from goals. • The employee occasionally beats deadlines for their own work and stay abreast of deadlines for their department. • Employee is occasionally proactive and anticipates the needs of the department prior to potential problems arising and bring to supervisor approval. • Frequently plans/organizes work to timely and effectively accomplish job duties with appropriate use of resources.

<p>Fully Achieves Expectations</p>	<ul style="list-style-type: none"> • Employees meets deadlines for their own work. • Takes responsibility for goal achievement. • Comfortable being held accountable for achievement. • Informs others when problems occur. • Helps teammates achieve goals. • Employee responds to departmental needs in a timely manner based on direction of supervisor or co-workers. Example: orders supplies when requested. • Work is planned to meet routine volume and timeliness and usually fulfills operational and customer service needs.
<p>Sometimes Achieves Expectations</p>	<ul style="list-style-type: none"> • Goal achievement suffers under pressure. • Lack of confidence sometimes interfered with achievement. • Needs to work on achieving several goals at once. • The employee occasionally misses deadlines for their own work. • Employee sometimes responds to departmental needs in a timely manner based on direction of supervisor or co-workers and needs reminders of supervisor or co-workers. • Frequently lacks organization and planning of work and does not adequately use available resources.
<p>Unsatisfactory/Rarely Achieves Expectations</p>	<ul style="list-style-type: none"> • Denies failure to achieve goals. • Does not seem to care about reaching goals. • Makes excuses when goals not attained. • Blames others. • The employee often misses deadlines for their own work and co-workers are relied upon to help to complete tasks. • Consistently fails to meet expected standards due to lack of effective organization, use of equipment/resources, or inattention to customer service needs.

SERVICE & RELATIONSHIPS - the extent to which the employee's behaviors are directed toward fostering positive working relationships in a civil workplace, respect for one's fellow workers, and cooperation with students, customers, and visitors.

<p>Consistently Exceeds Expectations</p>	<ul style="list-style-type: none"> • Relates to customers exceedingly well. • Has developed an incredibly loyal customer base. • Always delivers on promises. • Consistently promotes and maintains a harmonious/productive work environment. • Is respected and trusted and often viewed as a role model. • Often requested as a work partner. • Excellent conflict management skills. • Managers call this person a breeze to work with. • Effective interacting with people no matter the status. • Genuinely interested.
<p>Fully Achieves and Occasionally Exceeds Expectations</p>	<ul style="list-style-type: none"> • Has won us customer loyalty many times. • Graceful and tactful under pressure from customers. • Always patient, competent, and professional with customers. • Solves customer problems with speed and accuracy. • Frequently fosters teamwork, cooperation, and positive work relationships. ? • Handles conflict constructively and professionally. • Seeks first to understand. • Corrects others without being offensive. • Assertive, but does not offend. • Open to improving interpersonal skills

<p>Fully Achieves Expectations</p>	<ul style="list-style-type: none"> • Usually interacts in a cooperative manner. • Avoids disruptive behavior. Deals with conflict, frustration appropriately. • Usually competent and professional with customers. • Courteous and knowledgeable. • Manages all but the most challenging customer situations. • Sense of humor appropriate. • Gets along OK in most situations. • Communicates with others well. • A little awkward in some social situations. • Manages own anger well.
<p>Sometimes Achieves Expectations</p>	<ul style="list-style-type: none"> • Gets annoyed by customers with a lot of questions. • Sometimes gets sarcastic. • Presents a sloppy and uncaring image. • On several occasions has lost temper with customers. • Conducts personal phone conversations while customers wait. • Sometimes has difficulty getting along with others. • Has difficulty dealing with conflict, frustration appropriately. • Customer relation skills need improvement. • Does not always listen carefully. • Quick to lose patience. • Sometimes tells inappropriate jokes. • Does not use skills in emotionally charged situations. • Body language and words do not always match.

<p>Unsatisfactory/Rarely Achieves Expectations</p>	<ul style="list-style-type: none"> • Interpersonal relationships are counter-productive to work unit or team functions. • Often makes insensitive criticisms of others. • Talks behind people’s backs. • Received justified complaints from co-workers. • Has not benefited from coaching. • Consistently passive-aggressive. • Tries to look good by attacking others. • Frequently impolite. • Condescends to customers. • Ignores customers. • Shouted obscenities at a customer. • Very weak customer relation skills.
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Accountability & Dependability - the extent to which the employee contributes to the effectiveness of the department and the overall mission of the University. (NOTE: Time off approved under FMLA may not be considered.)

<p>Consistently Exceeds Expectations</p>	<ul style="list-style-type: none"> • Work consistently exceeds expectations of quality, quantity, and timeliness. • Employee always arrives to work on time. • Willingly takes accountability for all departmental activities. • Can always be counted on to complete assignments. • Always delivers on promises. • Highest level of dependability. • Achieves results with minimal resources. • Always achieves stated goals and more. • Assumes personal responsibility for his/her work. • Performs work independently and accurately. • Takes action and makes decisions quickly. • Always delivers on time. • Followed up personally with over __ customers.
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<p>Fully Achieves and Occasionally Exceeds Expectations</p>	<ul style="list-style-type: none"> • Work frequently exceeds expected quality, quantity, and timeliness standards. • Employee usually arrives to work on time. • Delivers on promises far more than not. • High level of accountability for projects. • Does not disappoint when deadlines are tight. • Almost always adheres to instructions/directions. • Performs most work independently. • Delivered_of __ completed reports on time. • Missed only ___ days of work in last year.
<p>Fully Achieves Expectations</p>	<ul style="list-style-type: none"> • Work usually meets expectations of quality, quantity, and timeliness. • Employee normally arrives to work on time. • Appropriate level of accountability. • Delivers on promises. • Adheres to policies and guidelines. • Conscientious worker. • Accountable for projects. • Follows direction and instructions. • Needs a little oversight on projects.
<p>Sometimes Achieves Expectations</p>	<ul style="list-style-type: none"> • Often has difficulty meeting expected quality, quantity, and timeliness standards. • Employee arrives to work tardy and has been reminded of the work schedule. • Fails to accept accountability for missed deadlines. • Does not accepted accountability for project failures. • Frequently fails to achieve goals. • Does not follow directions or instructions. • Needs oversight. • Does not take action or made decisions without direction. • Has missed deadlines ___ times. • Returned late from breaks __ times in the year.

<p>Sometimes Achieves Expectations</p>	<ul style="list-style-type: none"> • Often has difficulty meeting expected quality, quantity, and timeliness standards. • Employee arrives to work tardy and has been reminded of the work schedule. • Fails to accept accountability for missed deadlines. • Does not accepted accountability for project failures. • Frequently fails to achieve goals. • Does not follow directions or instructions. • Needs oversight. • Does not take action or made decisions without direction. • Has missed deadlines ___ times. • Returned late from breaks __ times in the year.
<p>Unsatisfactory/Rarely Achieves Expectations</p>	<ul style="list-style-type: none"> • Consistently fails to meet expected quality, quantity, and timeliness standards. • Employee frequently arrives to work tardy and has been reminded of work schedule and expectations. • Fails to ever accept accountability for own behavior or results. • Always attributes failure to others or circumstances. • Rarely delivers a project on time. • Does not achieve agreed upon goals. • Frequently does not follow directions or instructions. • Needs constant oversight. • Rarely takes action or makes decisions without guidance or direction. • Needs frequent reminders to keep projects on track. • Arrived late __ out of __ days in __ weeks. • Uses the phone for personal conversations.

EQUITY, DIVERSITY AND INCLUSION - the extent to which the employee treats others with fairness, dignity, and respect, fosters inclusiveness, values individual and group differences (e.g. age, gender, religion, race, ethnicity, sexual orientation, gender identity, nationality, veterans, disability, culture, position, and others), takes efforts to enhance diversity, inclusion and cultural humility, and contributes to departmental and organizational unit diversity strategic goals.

Consistently Exceeds Expectations	Supervisor	<ul style="list-style-type: none"> • Actively promotes EEO/diversity programs. • An excellent model of EEO practices. • Ensures staff represents percentage of protected classes in population. • Leads in promoting inclusion and diversity and is always results-oriented. • Dedicates more than enough resources for supporting diversity and always communicates the value of diversity.
Consistently Exceeds Expectations	Staff/All	<ul style="list-style-type: none"> • Invites diverse ideas. • Sensitive to and respectful of all individuals. • Treats everyone the way they wish to be treated and never alienates others.
Fully Achieves and Occasionally Exceeds Expectations	Supervisor	<ul style="list-style-type: none"> • Promotes and adheres to EEO/diversity program requirements. • Provides equal opportunities to members of protected classes. • Is free of bias in personnel evaluations. • Ensures that staff from disadvantaged backgrounds receive appropriate training. • Discourages any form of harassment, bullying, and abrasive behavior and leads in promoting team building activities. • Possesses understanding of the perspectives of others and demonstrates mutual respect, equity, and fairness.
Fully Achieves and Occasionally Exceeds Expectations	Staff/All	<ul style="list-style-type: none"> • Participates and contributes to a shared vision and works hand in hand with everyone when implementing programs. • Contributes to positive change and is seen as a spokesperson to promote diversity issues and concerns of others.

Fully Achieves Expectations	Supervisor	<ul style="list-style-type: none"> • Bases all personnel decisions on performance. • Supports EEO and diversity values. • Shows no indication of bias. • Makes decisions based on performance, not personal characteristics. • Has hired from diverse ethnic backgrounds.
Fully Achieves Expectations	Staff/All	<ul style="list-style-type: none"> • Treats others equitably and respects individual differences. • Adheres to EEO/diversity program requirements. • Shows no indication of bias. • Shows willingness to embrace people from diverse backgrounds and avoids alienating others. • Avoids making jokes that may be offensive to others and remains respectful to everyone. • Often welcomes and considers the ideas and views of other people. • Shows willingness to accept feedback, learn, and listen to concerns of others.
Sometimes Achieves Expectations	Supervisor	<ul style="list-style-type: none"> • Sometimes allows personal bias to affect job relationships. • Requires reminders regarding needs and sensitivities of others. • Inconsistently adheres to EEO/ diversity program requirements. • Needs to strengthen EEO/diversity orientation. • Has a lack of gender and racial diversity and beyond in supervisory positions. • Underrepresented, minorities enrolled in fewer training sessions. • Departmental makeup does not demonstrate a diverse workforce.
Sometimes Achieves Expectations	Staff/All	<ul style="list-style-type: none"> • Often unwilling to embrace people from diverse backgrounds and alienates others. • Is closed to the ideas and views of other people. • Does not easily accept feedback, learn, or listen to concerns of others.

Unsatisfactory/Rarely Achieves Expectations	Supervisor	<ul style="list-style-type: none"> • Has blatantly discriminated. • Often ignores EEO/ diversity program requirements. • Will not interview underrepresented minority candidates. • Has told off-color jokes in staff meetings. • Underrepresented minorities consistently receive lower performance ratings.
Unsatisfactory/Rarely Achieves Expectations	Staff/All	<ul style="list-style-type: none"> • Lags in supporting positive change and is never seen as a person who is open to the diversity issues of others. • Possesses little understanding of the perspectives of others and does not bother to make improvements.

DECISION MAKING & PROBLEM SOLVING - the extent to which the employee makes sound and logical job-related decisions that are in the best interest of the University. (As applicable, this element includes developing and managing human and fiscal resources within the framework of University policy.)

Consistently Exceeds Expectations	<ul style="list-style-type: none"> • Consistently prevents resolves unit/team problems and promotes improvements. • Maximizes resources, innovation/technology to streamline/improve. • Analyzes full dimension of complex problems. • Develops/implements solutions with minimal supervision. • Is a resource to colleagues for hazard safe work information and safe work practices; promotes continuous improvement and sustainable operations. • Clearly understands the implications of situations and uses sound judgement when deciding what to do. • Makes tough decisions. • Decisions always appropriate. • Weighs options carefully and thoughtfully.
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<p>Fully Achieves and Occasionally Exceeds Expectations</p>	<ul style="list-style-type: none"> • Prevents/resolves unit/team problems. • Suggests innovations to improve operations or streamline procedures. • Develops/implements solutions with moderate supervision. • Will make decision when others are afraid to commit to a course of action. • Analytic and decisive. • Decisions are well thought out. • Promotes hazard awareness and safe work practices among colleagues; reports incidents, near-misses, and concerns. • Decisions always result of detailed analysis. • Involves others in decision making. • Corrects others without being offensive.
<p>Fully Achieves Expectations</p>	<ul style="list-style-type: none"> • Addresses existing and significant potential problems. • Suggest or assists in developing solutions individually or in a team. • Carries through solution implementation with routine supervision or follow-up. • Resolves routine problems. • Usually makes appropriate decisions. • Consistently follows standard operation procedures, wears required PPE (if necessary) and properly reports incidents. • Gathers ample information to make reasoned decisions. • Considers many alternatives. • Involves others appropriately when making decisions. • Bases decisions on facts not personalities. • Communicates decisions clearly and directly.
<p>Sometimes Achieves Expectations</p>	<ul style="list-style-type: none"> • Exhibits little initiative in identifying problems, solutions, or improvements and/or working proactively as part of a team to address issues of concern. • Requires more than routine supervision. • Delays making necessary decisions. • Often comes to management for help with a decision. • Requires reminders follow standard operating procedures and wear PPE (if required). Does not properly report incidents, problematic workplace conditions or concerns. • Sticks with status quo rather than making a decision.

	<ul style="list-style-type: none"> • Uses gut rather than facts for decision making. • Always accepts others' decisions.
<p>Unsatisfactory/Rarely Achieves Expectations</p>	<ul style="list-style-type: none"> • Consistently fails to recognize or seek help in resolving routine problems. • Demonstrates inability to work individually or in a team. • Rarely suggests improvements. • Requires frequent reminders and supervision. • Extremely fearful of making a mistake. • Logic fails in decision making. • Often fails to see problems that require decisions. • Fails to gather necessary information for decision making. • Frequently makes bad decisions. • Does not follow standard operating procedures, wear appropriate PPE (if required), report incidents, or manage waste properly. • Never makes a decision. • Avoids decision-making situations.

Sources:

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