

# EVALUATING PERFORMANCE

Evaluating performance begins with knowing our Values.

## SERVICE

We seek opportunities to serve others and commit to providing the highest quality of service.



## CURIOSITY

We ask questions and seek new opportunities and changes through innovation.

## RESPECT

We are respectful, transparent and inclusive with each other.

## ACCOUNTABILITY

We perform at our very best every day to create a University that is responsive, efficient and effective.

## APPRECIATION

We support and value each other's contributions as we build a community that is One WVU.

These Values are the foundation on which we evaluate performance. The expectation is that all employees act in accordance with WVU Values not just in their job duties, but also in demeanor and people skills.

## DEMEANOR

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A person's outward behavior that gives others an impression of their character and attitude. Professional demeanor may be demonstrated as having a positive outlook, high level of motivation and continuous personal growth.

## PEOPLE SKILLS

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The ability to work well with others, communicate effectively, resolve conflicts, and collaborate respectfully in order to contribute to a positive and productive work environment.

# EVALUATING PERFORMANCE

As a people leader, your responsibility is to evaluate employee performance over the review period (e.g. last 12 months) using WVU performance metrics. Then, to rate each employee's performance within each metric on a four-descriptor scale.

There are four different performance descriptors that people leaders must choose from when completing performance reviews. See Page 3 - Performance Descriptors for a detailed description of each rating and when to apply them.

/ DEVELOPMENT NEEDED

/ VALUABLE PERFORMER

/ EXCEEDS REQUIREMENTS

/ SUBSTANTIALLY EXCEEDS REQUIREMENTS

Performance metrics are determined by whether or not the employee being rated has direct reports. For detailed descriptions of each performance metric, see Pages 4-8 - Performance Metrics.

Employees **without** direct reports

/ JOB KNOWLEDGE

/ CUSTOMER SERVICE

/ TEAMWORK

/ ACCOUNTABILITY / QUALITY

WORK / COMMUNICATION

/ PROACTIVITY / INITIATIVE

/ FLEXIBILITY

/ ADDITIONAL / OPTIONAL METRICS

Employees **with** direct reports

/ BUILDS A STRONG TEAM / HIRES AND  
RETAINS THE RIGHT PEOPLE

/ PRODUCTIVE / ACTION ORIENTED /  
SENSE OF URGENCY / PLANS AHEAD

/ MAKES DIFFICULT DECISIONS

/ PROVIDES EFFECTIVE PERFORMANCE  
MANAGEMENT

/ SEEKS CONTINUOUS IMPROVEMENT /  
SIMPLIFY / REDUCE BUREAUCRACY /  
EMBRACES CHANGE

/ TREATS OTHERS WITH RESPECT /  
VALUES DIVERSITY OF PEOPLE AND  
IDEAS / TEAMWORK

/ ADDITIONAL / OPTIONAL METRICS



Using the performance descriptors, how do you rate the employee's performance within each metric?

Which behaviors, achievements, or contributions has the employee shown to justify each rating? Which of these should be reinforced? Which should you encourage the employee to change? You will use these notes in the **Writing Effective Feedback Worksheet** to construct effective feedback to input into each review.

# PERFORMANCE REVIEW DESCRIPTORS

There are four different performance descriptors that people leaders must choose from when completing performance reviews -- Development Needed, Valuable Performer, Exceeds Requirements, and Substantially Exceeds Requirements. See below for a detailed description of each rating.

## PERFORMANCE SUBSTANTIALLY EXCEEDS REQUIREMENTS

Performance is far above the defined job expectations. Results are consistently excellent. The employee consistently does outstanding work, regularly going far beyond what is expected of employees in this job. Skill level and key behaviors are exemplary. This rating is reserved for those few distinguished performers and requires written justification.

## PERFORMANCE EXCEEDS REQUIREMENTS

Performance meets the defined job expectations and frequently exceeds job expectations. Results are consistently above average. The employee consistently does good work, regularly going beyond what is expected of employees in this job. The employee is generally doing a very good job. Skill level and key behaviors are above average. This rating is reserved for the exceptional performer and requires written justification.

## VALUABLE PERFORMER

Performance meets the defined job expectations. The employee is doing the job at the level expected for employees in this position and is doing a good job. Skill level is competent. Key behaviors are acceptable. The good performance is due to the employee's own effort and skills. This rating will be used for most employees.

## DEVELOPMENT NEEDED

Performance does not fully meet job expectations. Performance is below average. Skill level indicates need for improvement. Key behaviors are less than acceptable. It requires a written action plan for improvement with specific goals and time frames.

This rating can also be used for a new employee who is still within his/her probationary period and is still learning certain aspects of the job.

# PERFORMANCE METRICS

For employees **without** direct reports

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## JOB KNOWLEDGE

*The ability to demonstrate depth of knowledge and skill in a technical area*

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- Understands job procedures, policies, and responsibilities.
- Exhibits ability to learn and apply new skills.
- Keeps up-to-date on current developments.
- Effectively applies technical knowledge to solve a range of problems.
- Possesses an in-depth knowledge and skill in a technical area related to job.
- Develops technical solutions to new or highly complex problems that cannot be solved using existing methods or approaches.
- Is sought out as an expert to provide advice or solutions in his/her technical area.

## CUSTOMER SERVICE

*Understand the needs of internal and external customers*

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- Responds promptly to customers' needs in a courteous manner
- Handles conflicts appropriately
- Maintains University good will at all times
- Commits to doing the best job possible.

## TEAMWORK

*Exhibits flexibility, adaptability, and spirit of cooperation in the work environment; balances team and individual responsibilities; shares information appropriately with others*

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- Shares credit and recognition with others.
- Creates enthusiastic support for the goals of the unit, department, or university.
- Provides coaching and guidance that contribute to effective teamwork.
- Provides specific and frequent feedback that helps improve team performance.

## ACCOUNTABILITY / PRODUCES QUALITY WORK

*Takes responsibility for own actions and demonstrates the ability to get things done*

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- Accepts responsibility for making tough decisions.
- Assumes responsibility for own mistakes and avoids careless mistakes.
- Models behavioral expectations.
- Processes high standards for personal conduct.
- Completes assignments and projects on schedule.
- Completes work product thoroughly, accurately and according to specifications
- Displays commitment to process improvement
- Applies feedback to improve performance

# PERFORMANCE METRICS

For employees **without** direct reports

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## COMMUNICATION

*Effectiveness in dealing with leadership, peers, and subordinates*

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- Communicates in a clear and concise manner both verbally and in writing
- Clearly communicates respectfully with all individuals.
- Skillfully handles conflicts.
- Listens effectively to leadership, peers, and subordinates.
- Asks good questions and probes for answers.

## PROACTIVITY / INITIATIVE

*The ability to respond to problems, changes, and obstacles independently*

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- Eager to improve the way things are done.
- Takes action to solve problems and produce results without prompting.
- Seeks increased responsibilities

## FLEXIBILITY

*Ability to embrace changes with a positive attitude through modeling appropriate responses and behaviors when changes are made*

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- Open to change and to new information.
- Adapts behavior and work methods in response to new information, changing conditions, or unexpected obstacles.
- Sells the value of change to the workgroup.
- Keeps informed about cutting-edge research in his/her area of expertise.

## GOALS / PROJECTS / ASSIGNMENTS

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If goals, objectives, projects or assignments were assigned to the employee at the beginning of the evaluation period, Managers can evaluate the performance and the results achieved by the employee. Managers should provide an overall rating, whether it was one goal or multiple goals.

## OPTIONAL: JOB SPECIFIC MEASURES

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Blank spaces have been provided, and are designed to accommodate department-specific performance elements not covered by one of the performance elements listed on the form (which may be unique to this employee's job) as well as any measures related to compliance such as FERPA, HIPAA, NCAA, ethics, safety, state or federal regulations. This will reinforce accountability for these measures, which should be identified and discussed with the employee at the beginning of the performance review period.

# PERFORMANCE METRICS

For supervisors, managers, and project leaders **with** direct reports

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## **BUILDS A STRONG TEAM / HIRES AND RETAINS THE RIGHT PEOPLE**

*Effectiveness in influencing the performance of team members for positive results and supporting team efforts*

*Capacity to challenge themselves and their teams to continually improve and deliver distinguished performance*

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- Shares credit and recognition with others.
- Creates enthusiastic support for the goals of the unit, department, or university.
- Provides coaching and guidance that contribute to effective teamwork.
- Provides specific and frequent feedback that helps improve team performance.
- Provides a clear sense of direction for the team.
- Aligns goals with the universities' strategic objectives.
- Creates an environment that motivates others to strive to do more than expected.

## **PRODUCTIVE / ACTION ORIENTED / SENSE OF URGENCY / PLANS AHEAD**

*The ability to demonstrate depth of knowledge and skill in a technical area*

*The ability to manage time and keep functioning effectively when under pressure and maintain self-control in the face of hostility or provocation*

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- Effectively applies technical knowledge to solve a range of problems.
- Possesses an in-depth knowledge and skill in a technical area related to job.
- Develops technical solutions to new or highly complex problems that cannot be solved using existing methods or approaches.
- Is sought out as an expert to provide advice or solutions in his/her technical area.
- Remains calm under pressure.
- Can effectively handle several problems or tasks at once.
- Can manage time and projects through utilizing time management strategies.
- Manages own behavior to prevent or reduce feelings of stress.

## **MAKES DIFFICULT DECISIONS WITH DEPARTMENT OR UNIVERSITY-WIDE FOCUS**

*The maturity and responsibility demonstrated in management actions. The ability to get things done.*

*The ability to solve the many complex issues and problems inherent to the role by thinking ahead, planning contingencies, balancing competing interests and taking an analytical approach.*

*Ability to perform assigned job according to job description, meeting or exceeding performance standards and expectations.*

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# PERFORMANCE METRICS

For supervisors, managers, and project leaders **with** direct reports

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- Accepts responsibility for making tough decisions.
- Assumes responsibility for own mistakes and avoids careless mistakes.
- Models behavioral expectations.
- Processes high standards for personal conduct.
- Quickly attacks difficult problems using sound judgment and commitment.
- Identifies solutions to complex, ambiguous situations.
- Asks good questions and probes for answers.
- Quickly sorts relevant information from irrelevant information.
- Delegates tasks to appropriate personnel with a high degree of confidence when needed.
- Understands and adheres to universities' policies and procedures and other requirements and regulations.
- Makes use of resources, develops networks, gains cooperation from others to obtain information and accomplish goals.
- Sets reasonable expectations and outcomes.
- Uses good judgment about how to prioritize work.

## **PROVIDES EFFECTIVE PERFORMANCE MANAGEMENT / REVIEWS AND DEVELOPS STAFF APPROPRIATELY**

*Effectiveness in utilizing strengths to develop all members of the team*

*Effectiveness in dealing with upper management, peers, and subordinates*

*Effectiveness in solving conflicts between employees and projects including external vendors and contracts*

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- Identifies developmental moves and assignments.
- Uses multiple methods to develop everyone on the team.
- Gives constructive feedback and follows up to ensure learning occurs.
- Clearly communicates effectively with all individuals.
- Skillfully handles conflicts.
- Listens effectively to upper management, peers, and subordinates.
- Asks good questions and probes for answers.
- Addresses and resolves conflict in his/her work team.
- Creates a safe environment where employees feel empowered to address concerns and ask questions.
- Maintains a positive working relationship with external vendors.

## PERFORMANCE METRICS

For supervisors, managers, and project leaders **with** direct reports

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### SEEKS CONTINUOUS IMPROVEMENT / SIMPLIFY / REDUCE BUREAUCRACY / EMBRACES CHANGE

*Ability to embrace changes with a positive attitude through modeling appropriate responses and behaviors when changes are made*

*The ability to respond to problems, changes, and obstacles independently*

*Seeks opportunities for both personal and professional development that will have a positive impact on the university, department, or unit community*

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- Open to change and new information.
- Adapts behavior and work methods in response to new information, changing conditions, or unexpected obstacles.
- Sells the value of change to the workgroup.
- Keeps informed about cutting-edge research in his/her area of expertise.
- Eager to improve the way things are done.
- Takes action to solve problems and produce results without prompting.
- Considers and responds to opportunities to learn and grow by proposing new approaches, procedures, methods, or technologies.
- Develops better, faster, or less expensive ways to do things.

### TREATS OTHERS WITH RESPECT / VALUES DIVERSITY OF PEOPLE AND IDEAS / TEAMWORK

*Ability to act and perform according to ethical and integrity standards set by the university and state*

*Effectiveness in valuing and utilizing the skills of people of culture, ethnic backgrounds, gender, races, and values different from one's own point of view*

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- Acts with integrity and honesty in all business transactions and communications.
- Interacts with others in a polite, positive, and fair manner and forthright with no hidden agenda.
- Projects a positive, professional image.
- Establishes trust among all employees.
- Actively seeks participation and involvement from everyone on the team.
- Actively seeks to understand and utilizes the individual strengths of each employee on the team.

### GOALS / PROJECTS / ASSIGNMENTS

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If goals, objectives, projects or assignments were assigned to the employee at the beginning of the evaluation period, Managers can evaluate the performance and the results achieved by the employee. Managers should provide an overall rating, whether it was one goal or multiple goals.