## PERFORMANCE REVIEW RUBRICS for UCLA Student Affairs Performance Management Program (PMP)

These rubrics are provided to Student Affairs Staff to:

Aid supervisors in accurately rating employee performance

Ensure consistency and alignment in ratings within and across organizational areas

Help employees understand the expectations for their performance in each competency area

Promote a standardized and equitable approach to measuring and benchmarking performance across the organization

**OVERALL PMP RATING SCALE:**

| Does Not Meet Expectations | Partially Meets Expectations | Fully Meets Expectations | Exceeds Expectations | Exceptional Performance |
|---|---|---|---|---|
| Goals unmet, skills not demonstrated, improvement needed.  Major or ongoing problems that negatively impact organizational objectives | Inconsistent aspects of performance requiring improvement to meet some goals.  Shows capability but in a variable manner | Commendable performance that meets goals.  Competent performance in most situations and circumstances | Performance that consistently goes beyond meeting goals.  Superior performance in most situations and circumstances | Outstanding achievements that far exceed goals in all performance elements.  Consistently exemplary performance, including in demanding situations or circumstances. |

Each rubric further describes the criteria for performance in the relevant competency area.

Rubrics are strengthened by continual refinement through use and feedback.  As you use these rubrics in your performance reviews, we encourage you to send constructive feedback to the PMP Taskforce at the following email: pmpfeedback@saonet.ucla.edu

**WORK QUALITY:** Work products are professional, clear and comprehensive in keeping with UCLA department standards.

| | Does Not Meet Expectations | Partially Meets Expectations | Fully Meets Expectations | Exceeds Expectations | Exceptional Performance |
|---|---|---|---|---|---|
| **Meeting Standards for Work Quality** | Consistently fails to meet expectations for work deliverables; results consistently do not meet acceptable standards. | Sometimes fails to meet expectations for work deliverables; results do not always meet acceptable standards (frequent errors, late submissions, poor organization of work). | Consistently meets expectations for work deliverables; meets acceptable standards for all work objectives. | Meets all objectives; consistently produces high quality deliverables and work performance. | Consistently exceeds expectations for quality of work deliverables and performance, including those outside normal assignments. |
| **Accepting Responsibility** | Often fails to accept responsibility for errors on assigned tasks. | Inconsistently accepts responsibility for errors/mistakes on assigned tasks. | Accepts responsibility for errors/mistakes on assigned tasks. | Accepts responsibility for errors/mistakes on assigned tasks and actively works to correct them when possible. | Models responsibility and actions as if the risks are his or her own; Actively sets the standard that others follow for accountability. |
| **Accuracy** | Makes frequent errors, even when within skill ability. | At times, submits inaccurate work that needs to be redone. | Generally does work that is error free, seldom has to do work over. | Consistently produces work that is error free and shows consistent attention to detail. | Outstanding quality, rarely has to do work over, far exceeds expectations. |

| PRODUCTIVITY: Completes targeted outcomes efficiently and effectively. | | | | | |
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| | **Does Not Meet Expectations** | **Partially Meets Expectations** | **Fully Meets Expectations** | **Exceeds Expectations** | **Exceptional Performance** |
| **Ability to Work Independently** | Requires significant supervision to complete assigned work. | Completes some assigned work without supervision. | Completes assigned work independently. | Completes assigned work and at times demonstrates a high level of working independently. | Consistently and independently exceeds expectations in delivering on job responsibilities. |
| **Timeliness and Follow-Through** | Often fails to follow through and meet commitments to others on time. | Sometimes fails to follow through and meet commitments to others on time. | Follows through and meets commitments to others on time and/or provides appropriate notice when commitments may need to be revised. | Follows through and meets commitments to others on time; Goes above and beyond to ensure that commitments are met in agreed timeframes. | Shows exceptional commitment to ensuring that all work complete and delivered within agreed timeframes. |
| **Timeliness in Delivering Results** | Lack of technical ability or motivation regularly impairs ability to perform job responsibilities in a timely manner. | May require additional time to complete job assignments as a result of limited job mastery or effort. | Delivers timely and satisfactory results in all areas outlined in the job description. | Delivers timely and satisfactory results in all areas including those that may fall outside the job description. | Exhibits expertise and outstanding skills in delivering timely results even the most difficult and complex aspects of the job. |

**CUSTOMER FOCUS: Establishes and maintains good working relationships with constituents by understanding and responding promptly to constituent needs and expectations.**

| | Does Not Meet Expectations | Partially Meets Expectations | Fully Meets Expectations | Exceeds Expectations | Exceptional Performance |
|---|---|---|---|---|---|
| **Working Relationships** | Does not meet constituent needs; may undermine others' efforts to improve communication or resolve constituent issues. | Is inconsistent in building working relationships with constituents and meeting their needs. | Builds solid working relationships with constituents and is responsive to their needs. | Builds solid working relationships with constituents and establishes ongoing communications to resolve concerns and/or service problems promptly and professionally. | Consistently develops innovative ways to engage constituents, consistently leads the way to remove barriers to collaboration and service provision. |
| **Listening Skill** | Does not takes the time to actively listen to constituent concerns and requests; may provide inappropriate potential solutions due to lack of clarity about the initial problem. | Sometimes does not take the time to actively listen to constituent concerns and requests, and offer potential solutions. | Takes the time to actively listen to constituent concerns and requests, responding with empathy and respect in offering potential solutions or next steps. | At times exceeds expectations to actively listen to constituent concerns and requests, responding with empathy and respect in offering potential solutions or next steps. | Consistently goes above and beyond to take the time to actively listen to constituent concerns and requests, responding with a high level empathy and respect in offering potential solutions or next steps. |
| **Responsiveness to Needs** | Consistently demonstrates lack of responsiveness to constituents. | Is inconsistent in identifying and responding constituents' needs based upon departmental or organizational standards for service delivery. | Is consistently timely in identifying and responding constituents' needs based upon departmental or organizational standards for service delivery. | Frequently exceeds expectations for timeliness in identifying and responding constituents' needs based upon departmental or organizational standards for service delivery. | Proactively anticipates constituent needs and concerns and addresses them in a timely manner. |

## FUNCTIONAL/TECHNICAL KNOWLEDGE I: Demonstrates expertise in the functional and technical aspects of the job.

| | Does Not Meet Expectations | Partially Meets Expectations | Fully Meets Expectations | Exceeds Expectations | Exceptional Performance |
|---|---|---|---|---|---|
| **Overall Expertise in the Functional Areas of the Position** | Demonstrates a lack of job knowledge in areas of assigned responsibilities. | Needs more training and/or knowledge in order to perform adequately in the position. | Uses job knowledge/skills to perform all aspects of job description; learns skills needed to perform the responsibilities of the position. | Effectively uses job knowledge/skills to perform all aspects of job description; proactively learns skills needed to perform the responsibilities of the position. | Demonstrates superior knowledge and judgment; seeks additional project assignments or growth opportunities. |
| **Keeping Current with Job Knowledge** | Makes little effort to obtain new/current information related to job. | Sometimes fails to keep up with integrating new/current information related to job. | Consistently keeps up to date with information necessary to perform job functions. | Seeks to enhance educational, functional, and technical knowledge beyond the minimum requirements of the job. | Demonstrates initiative to augment and improve skills, knowledge, and abilities applicable to the job through training and education. |
| **Decision-Making on the Job** | Lack of knowledge impairs ability to develop appropriate solutions to issues. | Because of insufficient skills/knowledge, is inconsistent in providing the appropriate solutions to issues . | Consistently uses good judgment to resolve questions or concerns. | Is confident in making well-informed decisions based on depth of professional knowledge. | Is sought out by clients, peers, and leaders to provide input on issues. |
| **Understanding of SA Mission and Objectives** | Shows lack of understanding of SA mission, priorities, and outcomes and how own work contributes. | Has a fair understanding of SA mission, priorities, and outcomes but does not always align own work goals and objectives to optimize contribution to those goals. | Has a good understanding of SA mission, priorities, and outcomes and aligns own work goals and objectives to optimize contribution to those goals. | Has an excellent understanding of SA mission, priorities, and outcomes and aligns own work to those goals, and seeks new opportunities to contribute. | Has an exceptional understanding of SA mission, priorities, and outcomes and aligns their work goals and objectives to optimize contribution to those goals, developing new ideas and initiatives that maximize their contribution to the organization. |

## FUNCTIONAL/TECHNICAL KNOWLEDGE II: Proficient use of work-related equipment, tools, and software/technology

| | Does Not Meet Expectations | Partially Meets Expectations | Fully Meets Expectations | Exceeds Expectations | Exceptional Performance |
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| **Ability to Use Tools and Technology** | Does not use the tools or technology appropriate for a task. | Sometimes is unable to independently select the appropriate tools, technology and procedures to accomplish job tasks. | Uses the appropriate tools, technology and procedures to accomplish a task. | Chooses appropriate tools, technology, and/or methods to effectively and efficiently accomplish tasks; experiments with new processes. | Shows exceptional ability to select and use appropriate tools, technology, and/or methods to effectively and efficiently accomplish tasks; identifies and evaluates new options and makes recommendations when appropriate. |

## FUNCTIONAL/TECHNICAL KNOWLEDGE III: Follows established guidelines and procedures.

| | Does Not Meet Expectations | Partially Meets Expectations | Fully Meets Expectations | Exceeds Expectations | Exceptional Performance |
|---|---|---|---|---|---|
| **Alignment to Policy and Procedures** | Fails to learn and/or does not follow University and departmental policies and procedures. | Has adequate knowledge of University and departmental policies and procedures and generally carries out work accordingly. | Has clear knowledge of University and departmental policies and procedures and carries out work accordingly. | Has clear knowledge of University and departmental policies and procedures and consistently works in ways that align. Anticipates policy implications of future projects and addresses them in planning. | Understands, follows, and works to improve University and departmental policies and procedures and ensures accountability with consistent communication. |
| **Ethical Behavior** | Has demonstrated questionable or unethical behavior. | Occasionally lacks awareness of ethics in personal behavior and work practices. | Demonstrates values and ethics in personal behavior and work practices. | Consistently models a high level of ethical behavior, and at times serves as a role model to others. | Is a role model; consistently models ethics and behaviors that are expected of others. |

**COMMUNICATION SKILLS I: Uses clear and appropriate language in writing.**

| | Does Not Meet Expectations | Partially Meets Expectations | Fully Meets Expectations | Exceeds Expectations | Exceptional Performance |
|---|---|---|---|---|---|
| **Written Communication** | Rarely creates written communications or reports that are appropriate for the intended audience, clearly convey ideas, and are free from grammatical or other errors. | Is inconsistent in creating written communications or reports that are appropriate for the intended audience, clearly convey ideas, and are free from grammatical or other errors without guidance from others. | Creates written communications or reports that are appropriate for the intended audience, clearly convey ideas, and are free from grammatical or other errors, with minimal guidance from others. | Independently creates excellent quality written communications or reports that are appropriate for the intended audience, clearly convey ideas, and are free from grammatical or other errors. | Shows outstanding ability to develop high quality written communications or reports that are clear, concise, organized and convincing; Is a role model to others in clear and appropriate written communication. |

**COMMUNICATION SKILLS II: Verbally conveys information in a clear, accurate, and appropriate manner in a variety of situations.**

| | Does Not Meet Expectations | Partially Meets Expectations | Fully Meets Expectations | Exceeds Expectations | Exceptional Performance |
|---|---|---|---|---|---|
| **Ability to Make Self Understood/Express Ideas** | Is frequently unable to express ideas clearly to others in a professional and appropriate manner. | Sometimes is unable to express ideas clearly to others in a professional and appropriate manner. | Regularly expresses ideas to others in a professional and appropriate manner. | Shows strong ability to express ideas to others in a professional and appropriate manner. | Excels in ability to express ideas to others in a professional and appropriate manner; adjusts information delivery to a variety of audiences. |
| **Verbal Communication** | Has poor verbal communication skills; is often unclear in communicating with others. | Sometimes unclear in verbal communication. | Communicates clearly with others verbally in a variety of settings. | Consistently communicates clearly with others verbally in a variety of settings, including those involving challenging ideas or complex technical information. | Is an excellent oral communicator in a variety of settings, including those involving challenging ideas or complex technical information. |

**COMMUNICATION SKILLS III: Produces and delivers formal presentations to a variety of audiences, when applicable.**

| | Does Not Meet Expectations | Partially Meets Expectations | Fully Meets Expectations | Exceeds Expectations | Exceptional Performance |
|---|---|---|---|---|---|
| **Delivery of Presentations** | Often gives oral presentations that are unclear and/or inappropriate for the intended audience. | Oral presentations are sometimes unclear and may be inappropriate for the intended audience. | Oral presentations are clear and appropriate for the intended audience. | Makes clear and convincing oral presentations geared toward the intended audience, presenting information, analysis, and recommendations appropriate to the context. | Excels at clear and convincing oral presentation for a variety of audiences, clearly presenting information, analysis, and recommendations, including those that may address sensitive information. |

**TEAMWORK/INTERPERSONAL RELATIONS/FLEXIBILITY I: Works collaboratively with fellow employees and colleagues to achieve identified goals and objectives.**

| | Does Not Meet Expectations | Partially Meets Expectations | Fully Meets Expectations | Exceeds Expectations | Exceptional Performance |
|---|---|---|---|---|---|
| **Team Focus & Contribution** | Engages in behaviors that are an obstacle to collaboration on projects or in work teams; demonstrates significant limitations in being a team player; does not collaborate with others in the organization. | Generally does not provide or contribute to a work environment that supports collaboration; sometimes has difficulty in establishing collaborative relationships. | Promotes teamwork within own work group and the broader organization. | Promotes teamwork within own work group and the broader organization, and looks for opportunities to engage with others. | Creates an environment of trust and collaboration; consistently motivates others on the team to overcome challenges; is a leader in collaborating with others in the organization. |
| **Contribution to Team Goals** | Has a negative impact on the team and may obstruct other team members in making progress on team goals | Is inconsistent in collaboration on team goals and objectives; does not always assist the team in achieving goals. | Consistently collaborates on team goals and objectives and regularly assists the team in achieving goals. | Consistently collaborates to improve the organization, contributing ideas and expertise to move goals and objectives forward; assists the team in achieving goals. | Uses every opportunity to collaborate with colleagues and work actively to achieve group goals; works to build, evaluate and foster team effectiveness and success. |
| **Collaborative Focus** | Rejects opportunities to collaborate with others to build strategic relationships and achieve common goals. | Does not seek opportunities to collaborate with others to build strategic relationships and achieve common goals unless specifically directed to do so. | Seeks opportunities to collaborate with others to build strategic relationships and achieve common goals. | Regularly seeks opportunities to collaborate across organizational boundaries to build strategic relationships and achieve common goals. | Provides high-level value in helping plan, organize and coordinate work effectively across multiple departments or work teams. |
| **Sharing Information with Others** | Is uncooperative on group projects or in work groups. | At times withholds information that would assist others' completion of work/ projects. | Shares relevant information/ knowledge with others. | Consistently shares relevant information/ knowledge with others in ways that contribute to team effectiveness. | Anticipates the information needed by others and communicates it in a timely manner. |
| **Giving and Receiving Feedback** | Rarely practices active listening; often has difficulty with receiving and integrating feedback from others; frequently provides feedback to others in ways that are not constructive. | Does not always practice active listening and may have difficulty with receiving and integrating feedback from others; sometimes provides feedback to others in ways that are not constructive. | Practices active listening and seeks feedback; generally open to receiving and integrating feedback and providing feedback to others. | Practices active listening and seeks feedback from all available sources; open to receiving and integrating feedback and provides constructive feedback to others as appropriate. | Excels at active listening and gathering feedback from all available sources; is committed to receiving and integrating feedback and provides clear and constructive feedback to others as appropriate. |

**TEAMWORK/INTERPERSONAL RELATIONS/FLEXIBILITY II:** Builds productive rapport with peers, colleagues and students at all levels within and outside the department. Treats others with respect, and dignity, and fosters the value of diversity and inclusion.

| | Does Not Meet Expectations | Partially Meets Expectations | Fully Meets Expectations | Exceeds Expectations | Exceptional Performance |
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| **Building Rapport** | Fails to build relationships with people in the department or the larger campus community; fails to work cooperatively when the situation calls for it; may negatively influence others' attempts to create a collaborative work environment. | Is inconsistent in efforts to build relationships with people in the department or the larger campus community; often needs to be encouraged to work cooperatively. | Develops good working relationships with people in the department and campus community. | Establishes strong working relationships throughout the organization; contributes to creating a work environment that supports every person in an atmosphere of mutual respect, cooperation, professionalism and fairness. | Actively builds constructive and effective relationships throughout the organization; creates a cooperative atmosphere that considers and responds appropriately to needs in a variety of different situations. Is tactful, diplomatic and demonstrates consistency, mutual respect, cooperation, professionalism and fairness. |
| **Respect for Others** | Consistently not approachable. | At times, does not exhibit behaviors of mutual respect, cooperation, professionalism, and/or fairness in interacting with others in the workplace or in relation to constituents. | Regularly exhibits behaviors of mutual respect, cooperation, professionalism, and/or fairness in interacting with others in the workplace or in relation to constituents. | Consistently models standards of equitable, fair, and inclusive behaviors. Uses these standards in all interactions. | Is a model employee in demonstrating respect and inclusion; demonstrates high standards of respect, cooperation, professionalism and fairness. |
| **Inclusion of Diverse Ideas** | Is resistant to including diverse points of view; may disregard ideas of others based on their ethnicity, age or other identity characteristics. | Inconsistently involves a diverse group of people and ideas in projects, processes and decision-making. | Regularly includes diverse points of view, opinions and ideas in projects, processes and decision-making. | Is proactive in demonstrating inclusivity of diverse points of view, opinions and ideas in projects, processes and decision-making. | Actively seeks opportunities to incorporate diverse points of view, opinions and ideas in all projects, processes and decision-making. |
| **Dealing with Conflict** | Creates conflict, or reacts inappropriately in situations of conflict. | Is inconsistent in ability to recognize and diffuse tense situations; is sometimes flustered in situations of conflict. | Remains calm when presented with situations of conflict, and attempts to diffuse them. | Successfully recognizes and diffuses tense situations; remains calm when presented with highly conflict laden situations. | Highly effective in dealing with conflict; is a role model in helping others identify conflict triggers and navigate tense situations; proactively works to prevent conflict. |

**TEAMWORK/INTERPERSONAL RELATIONS/FLEXIBILITY III:** Adjusts performance to accommodate changes in departmental direction and processes.

| | Does Not Meet Expectations | Partially Meets Expectations | Fully Meets Expectations | Exceeds Expectations | Exceptional Performance |
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| **Managing Disruption and Change** | Unable to handle changes in plans and priorities; needs supervision to stay on task and has difficulty focusing on priorities; has trouble completing workload when interrupted and is unable to reprioritize without help. | Sometimes has trouble dealing with interruptions and reprioritizing work responsibilities; occasionally needs assistance in coordinating priorities and timelines. | Can effectively navigate interruptions and reprioritize work responsibilities to meet priorities and timelines. | Demonstrates ability to focus on important priorities; can work through both planned and unplanned interruptions; handles several tasks at once. | Knows the status of one's own work at all times and can be flexible with changes in plans by prioritizing throughout the day. |
| **Flexibility** | Is unwilling to assume new and/or different work assignments or to modify work methods in concert with changing needs. | Sometimes demonstrates negativity and an unwillingness to proceed with new work roles/assignments once a decision has been made. | Demonstrates a willingness to assume new and/or different work assignments and is open to modifying work methods in concert with changing needs. | Shows great flexibility in assuming new and/or different work assignments and modifying work methods in concert with changing needs. | Extremely flexible in assuming new and/or different work assignments and modifying work methods in concert with changing needs; suggests opportunities and strategies for effective change processes to accommodate new directions. |
| **Change Management** | Opposed to change and sometimes undermines agreed-upon process changes. | Is inconsistent in supporting change. | Regularly supports change processes in the department and participates as needed in planning for change. | Regularly develops creative and innovative approaches to responsibilities and projects. | Makes regular and valuable recommendations for improving their own or group work and processes, including developing creative and specific plans for implementation. |

| INNOVATION: Explores and suggests new approaches and methods to achieve departmental goals and responsibilities. | | | | | |
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| | Does Not Meet Expectations | Partially Meets Expectations | Fully Meets Expectations | Exceeds Expectations | Exceptional Performance |
| Innovation | Actively obstructs efforts to make changes that contribute to achieving the departmental goals and responsibilities. | Inconsistent in taking initiative to contribute to achieving the departmental goals and responsibilities. | Regularly contributes to discussion and planning for changes or improvements that contribute to achieving the departmental goals and responsibilities. | Creates or improves programs and processes that contribute to the organizational mission and goals and responsibilities. | Actively pursues opportunities to create or improve programs, processes; brings ideas to the table to meet the needs of the campus community. |

## PROBLEM SOLVING: Analyzes facts and data, using sound judgment, to arrive at effective solutions

| | Does Not Meet Expectations | Partially Meets Expectations | Fully Meets Expectations | Exceeds Expectations | Exceptional Performance |
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| **Analysis of Facts and Data** | Does not collect facts before making decisions or taking action, and/or jumps to conclusions based on incomplete or inaccurate data gathering and analysis. | Occasionally needs prompting to gather information, propose solutions, and identify possible tools and resources. | Regularly gathers information to inform proposed solutions, and identify possible tools and resources. | Weighs the consequences, implications and feasibility of alternative solutions for problems based on available data before making a decision. | Teaches others how to use information anticipate possible problems, weighs consequences, and develop contingency plans to avoid or go around them. |
| **Judgment and Decision-Making** | Uses poor judgment in routine situations and never anticipates consequences of decisions, refuses to implement decisions. | Uses fair judgment in routine situations and seldom anticipates consequences of decisions, implements decisions reluctantly. | Uses good judgment and usually anticipates consequences of decisions, implements decisions firmly. | Consistently uses excellent judgment and anticipates consequences of decisions, implements decisions firmly. | Uses exceptional judgment in all situations, always anticipates consequences of decisions, makes independent, timely and sound decisions even with limited information, implements decisions confidently. |
| **Problem Solving** | Denies existing problems and issues; Consistently unable to see problems. | Judgments and decisions are sometimes faulty or show lack of understanding or forethought. | Regularly engages in decision-making that demonstrates clear understanding of the major issues and potential challenges. | Utilizes critical thinking skills to analyze issues, identify problems, and resolve conflicts. | Advocates for improvements that demonstrate both breadth and depth of understanding and reflect innovative trends and approaches from multiple sources. |
| **Solutions Orientation** | Fails to take into consideration alternative actions, resources or constraints when selecting a method for accomplishing a task or project. | Inconsistently takes into consideration alternative actions, resources or constraints when selecting a method for accomplishing a task or project. | Regularly considers multiple actions, resources, and constraints before selecting a method for accomplishing most tasks or projects. | Consistently considers multiple actions, resources, and constraints before selecting a method for accomplishing tasks or projects. | Effectively considers alternative solutions and approaches before taking action; focuses on facts and solutions instead of opinions and problems; thinks clearly and strategically under pressure. |

**DEPENDABILITY/SELF-MANAGEMENT I:** Consistently adheres to set work schedule and completes assignments in a timely fashion.

| | Does Not Meet Expectations | Partially Meets Expectations | Fully Meets Expectations | Exceeds Expectations | Exceptional Performance |
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| **Time Management** | Does not allocate, coordinate and/or organize projects and/or time to avoid conflicts. | Requires some supervision and oversight on allocating and coordinating time effectively, even on tasks/projects that are within capabilities. | Allocates, coordinates and organizes projects and/or time to avoid conflicts. | Allocates, coordinates and organizes projects and/or time to avoid conflicts, juggling both short- and long-range objectives. | Is creative and effective in efforts to allocate, coordinate and organize projects and/or time to avoid conflicts, juggling both short- and long-range objectives. |
| **Attendance and Absenteeism** | Has excessive absences and tardiness; consistently unable to adhere to set work schedule. | Has frequent absences and tardiness; does not always provide advance notice of necessary deviations from set work schedule. | Consistently adheres to set work schedule; provides advance notice of necessary deviations from set work schedule. | Consistently adheres to set work schedule; provides advance notice of necessary deviations from set work schedule; demonstrates willingness to adjust work schedule to accommodate emerging departmental needs. | Consistently adheres to set work schedule; provides advance notice of necessary deviations from set work schedule; regularly adjusts work schedule to accommodate emerging departmental needs. |

**DEPENDABILITY/SELF-MANAGEMENT II:** Demonstrates initiative by setting priorities, regularly completing work on schedule, and fulfilling commitments.

| | Does Not Meet Expectations | Partially Meets Expectations | Fully Meets Expectations | Exceeds Expectations | Exceptional Performance |
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| **Priority Setting** | Rarely sets priorities and work goals. Decisions do not reflect organizational priorities. | Does not independently set priorities and work goals; may make decisions about work priorities that do not reflect organizational priorities. | Independently sets well-defined priorities and realistic work goals. | Independently sets well-defined priorities and realistic work goals; Is able to effectively revise plans when competing priorities arise in ways that align with organizational goals. | Proactively develops well-defined priorities and realistic work goals that reflect organizational priorities; is a role model to others in managing competing priorities and developing goals that align with the organization. |
| **Completing Work on Schedule** | Does not complete assigned work or meet schedules and deadlines. | Inconsistent in completing assigned work and meeting schedules and deadlines. | Consistently completes assigned work and meets schedules and deadlines. | Consistently completes assigned work on or before agreed upon schedules and deadlines. | Never fails to complete assigned work on or before agreed upon schedules and deadlines. |
| **Use of Organizational Systems** | Unable to use systems in place to create/maintain informational files, records, projects or information. | Inconsistently uses systems in place to create/maintain informational files, records, projects or information. | Regularly uses systems in place to create/maintain informational files, records, projects or information and enhance productivity. | Consistently demonstrates effective use of systems in place to create/maintain informational files, records, projects or information; ensures that materials and information are prepared to maximize productivity. | Models for others the systematic use of systems to create/maintain informational files, records, projects or information and ensure that materials and information are prepared to maximize productivity. |

| TRAINING REQUIREMENTS: Completes UC mandatory training on a timely basis. | | | | | |
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| | Does Not Meet Expectations | Partially Meets Expectations | Fully Meets Expectations | Exceeds Expectations | Exceptional Performance |
| Meeting Training Requirements | Has not completed one or more required trainings. | Was late in completing one or more required trainings. | Has fully completed all required trainings prior to the set deadlines. | N/A | N/A |

| **SUPERVISORY AND MANAGEMENT I:** Demonstrates leadership by creating a culture that supports individual motivation, high levels of individual and team performance, and quality of service. | | | | | |
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| | **Does Not Meet Expectations** | **Partially Meets Expectations** | **Fully Meets Expectations** | **Exceeds Expectations** | **Exceptional Performance** |
| **Support of Staff** | Creates an environment that is unsupportive of staff contributions; may negatively influence team motivation to achieve objectives. | Is inconsistent in creating an environment that is supportive of staff contributions. | Creates an environment that is supportive of staff contributions. | Creates an environment that is supportive of staff contributions and actively encourages team to focus on strategic and organizational goals and supports them developing clear steps and structures to help achieve success. | Creates an environment that is extremely supportive of staff contributions, encourages staff to excel and fosters development of new ideas; highly effective in mobilizing and motivating teams to achieve objectives. |
| **Fostering Individual Performance** | Rarely provides direction and motivation for subordinates. | Is inconsistent in providing direction and motivation for subordinates to perform job tasks and improve skills and knowledge. | Provides clear direction and motivates subordinates to perform and improve skills and knowledge. | Dedicates time and resources to developing skills of subordinates; delegates tasks effectively, provides clear direction and motivates others to perform job duties and improve skills. | Willingly serves as a mentor to own subordinates and others in the organization. |
| **Organizational Vision** | Does not readily broaden personal perspective to account for complex or multiple issues and consequences. | May frame an issue and/or strategy in a narrowly defined way, sometimes omitting significant perspectives or trends. | Frames issues and develops strategies that reflect a thorough understanding of broad external and internal trends. | Frequently identifies and capitalizes on new opportunities that will improve the organization. | Demonstrates exceptionally creative and expansive ideas for opportunities to meet departmental and organizational mission and objectives. |
| **Organizational Communication** | Does not communicate effectively with employees, peers and upper management; struggles to share ideas and encourage participation in decision-making; may fail to share information important to staff members' effective planning and execution of their assigned responsibilities. | Sometimes demonstrates ineffective communication with employees, peers and upper management; inconsistently shares ideas and encourages participation in decision-making. | Demonstrates effective communication for an open and productive work environment; regularly shares ideas and encourages participation in decision-making. | Consistently demonstrates effective communication for an open and productive work environment, sharing ideas and encouraging participation in decision-making; identifies and shares information important to staff members' effective planning and execution of their assigned responsibilities. | Consistently demonstrates skill and initiative in communicating and creating an open and productive work environment where ideas and critical information are effectively transmitted through all levels of the organization. |

**SUPERVISORY AND MANAGEMENT II:** Fosters the value of diversity and inclusiveness, treating all employees with respect, dignity, and fairness in support of equal employment opportunity and affirmative action objectives.

| | Does Not Meet Expectations | Partially Meets Expectations | Fully Meets Expectations | Exceeds Expectations | Exceptional Performance |
|---|---|---|---|---|---|
| **Modeling Inclusivity and Respect** | Rarely engages in behaviors of mutual respect, cooperation, professionalism, and/or fairness and fails to communicate expectations for respectful interactions to staff. | Inconsistently engages in behaviors of mutual respect, cooperation, professionalism, and/or fairness and communication of similar expectations for interaction to staff. | Regularly engages in behaviors of mutual respect, cooperation, professionalism, and/or fairness and communicates similar expectations for interaction to staff. | Consistently models standards of equitable, fair, and inclusive behaviors, and regularly communicates the value and expectation of such behaviors to staff. Models inclusive and respectful behavior for others. | Is a model employee in communicating the value of and personally demonstrating respect and inclusion in all planning and interactions; actively engages with the University community in ways that promote inclusivity and respect. |
| **Promoting Equity** | Rarely demonstrates fairness in providing opportunities and critical correction to staff; may make judgments of merit or performance that are biased by individual identity characteristics; lacks knowledge of affirmative action and non-discrimination policies; deficient knowledge may adversely affect performance of job responsibilities. | Inconsistently demonstrates fairness in providing opportunities and critical correction to staff; does not consider if judgments of merit or performance might be biased by individual identity characteristics; demonstrates gaps in knowledge of affirmative action and non-discrimination policies that may affect job performance. | Demonstrates fairness in providing opportunities and critical correction to staff; does not allow judgments of merit or performance to be biased by individual identity characteristics; demonstrates knowledge of affirmative action and non-discrimination policies and acts in accordance. | Is highly effective in creating a culture in which staff feel respected and treated equitably. | Has a clear focus on equity and inclusion both within own work sphere and in the larger University community; creates spaces where staff and students consistently experience feelings for respect and inclusion. |
| **Fostering a Positive Climate for Diversity** | Does not contribute to developing an environment in which staff exhibit behaviors of mutual respect, cooperation, professionalism, and/or fairness in interacting with others in the workplace or in relation to constituents. | Is inconsistent in work to develop an environment in which staff exhibit behaviors of mutual respect, cooperation, professionalism, and/or fairness in interacting with others in the workplace or in relation to constituents. | Develops an environment in which staff exhibit behaviors of mutual respect, cooperation, professionalism, and/or fairness in interacting with others in the workplace or in relation to constituents. | Highly skilled in creating and maintaining an environment in which staff exhibit behaviors of mutual respect, cooperation, professionalism, and/or fairness in interacting with others in the workplace or in relation to constituents; staff describe/experience the workplace as one supportive of diversity and inclusion. | Is a role model in creating a climate of respect for diversity both within the department and the University community; actively engages in behaviors that support and contribute to the University commitment to fostering diversity and inclusion across campus. |

| SUPERVISORY AND MANAGEMENT III: Supports staff development for employees supervised and maximizes existing skills in all employees. | | | | | |
|---|---|---|---|---|---|
| | Does Not Meet Expectations | Partially Meets Expectations | Fully Meets Expectations | Exceeds Expectations | Exceptional Performance |
| Coaching and Training | Rarely attends developmental needs of employees, either in planning or required feedback and coaching. | Occasionally uses coaching techniques; Sometimes demonstrates focus on development and helping employees train for necessary skills. | Regularly uses coaching techniques; demonstrates focus on development and helping employees train for necessary skills. | Understands and uses techniques for coaching; ensures all direct reports have development plans, are achieving them, and gaining diverse experiences for growth. | Uses coaching techniques consistently; ensures direct reports and next level have development plans, are achieving them and preparing for future needs; ensures key role succession in place. |
| Rewarding Performance | Needs prompting or has difficulty in providing effective rewards and recognition for deserving employees or efforts. | Sometimes has difficulty recognizing employees and their contributions, skills and ideas; occasionally needs prompting to use reward programs. | Understands how to recognize employees and their contributions; uses reward and recognition programs in effective and appropriate ways. | Understands how and when to recognize employees; uses not only formal programs but is creative in designing for situation; uses reward and recognition programs with exemplary effect. | Regularly uses recognition and rewards in creative and effective ways as evidenced by high level of staff motivation and performance. |
| Supporting Professional Development | Ignores or resists planning for ongoing professional development opportunities for staff. | Is inconsistent in attention to professional development and developing structures and processes to support ongoing conversation, planning, and logistical support for staff development plans. | Understands the need for ongoing professional development and creates appropriate structures and processes to support ongoing conversation, planning, and logistical support for staff development plans. | Is committed to ongoing professional development and uses strong, comprehensive structures and processes to support ongoing conversation, planning, and logistical support for staff development plans; assists staff in identifying appropriate development opportunities. | Highly effective in supporting ongoing professional development and uses strong, comprehensive structures and processes to support ongoing conversation, planning, and logistical support for staff development plans; assists staff in identifying appropriate development opportunities and thinks creatively and proactively about creating development opportunities for staff. |

| **SUPERVISORY AND MANAGEMENT IV:** Provides employees with performance standards, expectations, and ongoing feedback regarding progress and | | | | | |
|---|---|---|---|---|---|
| | **Does Not Meet Expectations** | **Partially Meets Expectations** | **Fully Meets Expectations** | **Exceeds Expectations** | **Exceptional Performance** |
| **Establishing Performance Standards and Goals** | Does not establish clear goals for employees and for the organization. | Is inconsistent in identifying future goals and strategies; sometimes has difficulty establishing goals that are challenging but realistic. | Sets clear goals for employees and organization; demonstrates ability to establish challenging but realistic goals. | Is able to articulate a clear and compelling vision and goals for the organization and clearly articulate individual roles and responsibilities in achieving them. | Is a resource to others on setting high standards; envisions and articulates a future state and rallies others to achieve strategic and organizational goals |
| **Monitoring Staff Progress and Performance** | Rarely monitors performance against set goals to ensure progress and completion. | Does not always measure progress and completion; may lack skills and experience to intervene when performance is lacking. | Regularly measures progress and completion of staff goals and intervenes when necessary to correct course. | Consistently effective in measuring progress and completion of staff and departmental goals; intervenes when necessary to facilitate course correction. | Exemplary ability to measure progress and completion of staff goals and their contributions to overall departmental goals; intervenes when necessary both to sustain motivation and to facilitate course correction; shows courage in making difficult decisions. |
| **Discipline** | Is avoidant or ineffective in ability to discipline employees; often fails to use behavior-based feedback or follow University established procedures. | Is inconsistent in ability to discipline employees; may avoid addressing issues; may not use behavior-based feedback or follow University established procedures. | Is able to discipline employees when needed, using appropriate behavior-based feedback and following University established procedures. | Is able to discipline employees when needed; anticipates potential issues early and intervenes quickly using appropriate behavior-based feedback and following University established procedures. | Is extremely effective in identifying the need for and applying appropriate disciplinary actions; is skilled in implementing behavior-based feedback and following University established procedures. |
| **Communication of SA Mission and Objectives** | Does not communicate SA mission, priorities, and outcomes to staff. | Is inconsistent in ability to communicate SA mission, priorities, and outcomes, and how staff work can and should align to these goals. | Communicates with staff about the SA mission, priorities, and outcomes; helps staff understand how their work aligns to these goals. | Consistently communicates the SA mission, priorities, and outcomes; regularly helps staff understand how their work aligns to these goals, actively encouraging their contribution to the organization. | Has an exceptional ability to communicate the SA mission, priorities, and outcomes to create a culture in which staff acknowledge and embrace their connection to larger Student Affairs objectives; consistently encourages staff to align work to the SA goals, actively encouraging their contribution to the organization. |

| **SUPERVISORY AND MANAGEMENT V:** Conducts annual performance evaluations for all direct reports and ensures completion for units under one's organizational | | | | | |
|---|---|---|---|---|---|
| | **Does Not Meet Expectations** | **Partially Meets Expectations** | **Fully Meets Expectations** | **Exceeds Expectations** | **Exceptional Performance** |
| **Performance Review** | Has major challenges with timely and comprehensive completion of performance evaluations for all direct reports. | Is inconsistent in attention to timelines and thorough completion of performance evaluations for all direct reports. | Completes performance evaluations for all direct reports with timeliness, thoroughness, and adhering to all organizational guidelines and processes. | Consistently completes performance evaluations for all direct reports with timeliness, thoroughness, and adhering to all organizational guidelines and processes; helps ensure others in the organization understand the importance of timely and thorough completion. | Is exceptional in developing processes to ensure timely and comprehensive completion of performance evaluations for the organization including adherence to all organizational guidelines. |

| **SUPERVISORY AND MANAGEMENT VI:** Manages the recruitment process effectively to attract, select, and hire the best talent to meet organizational objectives. | | | | | |
|---|---|---|---|---|---|
| | **Does Not Meet Expectations** | **Partially Meets Expectations** | **Fully Meets Expectations** | **Exceeds Expectations** | **Exceptional Performance** |
| **Personnel Management** | Is consistently poor in ability to recruit, select, and retain employees who can contribute to organizational goals. | Is inconsistent in ability to recruit, select, and retain employees who can contribute to organizational goals. | Recruits, selects, and retains employees who can contribute to organizational goals. Is able to identify the skills, knowledge, and abilities required to meet departmental needs and design selection processes that allow for such abilities to be assessed. | Builds and manages workforce based on organizational goals, budget considerations, and staffing needs; is skilled in identifying the skills, knowledge, and abilities required to meet departmental needs and designing selection processes that allow for such abilities to be assessed. | Is extremely effective and creative in developing a workforce appropriate to accomplishing organizational goals, including matching skilled talent to specific organizational objectives. |

**FINANCIAL/RESOURCE MANAGEMENT I: Manages financial performance in area of responsibility in accordance with budget and departmental goals.**

| | Does Not Meet Expectations | Partially Meets Expectations | Fully Meets Expectations | Exceeds Expectations | Exceptional Performance |
|---|---|---|---|---|---|
| **Budget Management** | Fails to integrate financial and management information into plans and processes; wastes resources, invests or expends resources on outmoded or unsuccessful programs or activities. | Budget decisions and expenditure requests are not always well thought out; occasionally lapses in adhering to budgeting and financial management procedures. | Consistently develops clear plans for budgeting and expenditure requests, following University guidelines and standards. | Makes well thought-out budget decisions and requests; demonstrates accountability and discretion in managing University resources; understands and adheres to all budgeting and financial management procedures. | Is a role model to others in wisely managing University resources. |

**FINANCIAL/RESOURCE MANAGEMENT II: Manages assets effectively including technology, equipment, budget and space, where applicable.**

| | Does Not Meet Expectations | Partially Meets Expectations | Fully Meets Expectations | Exceeds Expectations | Exceptional Performance |
|---|---|---|---|---|---|
| **Management of Technology, Equipment and Space** | Consistently ignores needs for improvement in technology, equipment and space, contributing to major lapses in organizational effectiveness. | Is inconsistent in use and management of technology, equipment and space to achieve organizational goals; may miss or ignore needs for improvement, contributing to decrease in organizational effectiveness. | Ensures effective use of technology, equipment and space to achieve organizational goals; attentive to departmental needs and develops plans to address them, including regular schedules of replacement. | Proactively seeks input on departmental technology, equipment and space needs and develops plans to address them, including regular schedules of replacement; ensures effective use of technology, equipment and space to achieve organizational goals, reconfiguring plans and securing additional resources as needed. | Is extremely effective in managing and using technology, equipment and space to achieve organizational results; anticipates future needs and plans to meet them. |