# **FYXX Performance Review**

Performance reviews are a key component of employee development. This evaluation is intended to be a fair and balanced assessment of the employee's performance since the last review. Meaningful two-way feedback provides the employee and the manager with an understanding of how past performance combined with a review of expectations creates an environment for career growth and continuous improvement.

## **Review Details**

Evaluation Period:

Mid-Year: Date:

End-Year: Date:

Other: Click or tap here to enter other.

Evaluation By:

Employee (Self-Assessment)

Manager

## **Employee Information**

Employee Name: Click or tap here to enter employee name.

Job Title: Click or tap here to enter job title.

Organization or Department: Click or tap here to enter organization or department.

Manager: Click or tap here to enter manager.

|  |  |  |  |
| --- | --- | --- | --- |
| **Unsatisfactory** | **Needs Improvement** | **Met/Exceeded Expectations** | **Exceptional** |
| Performance was below expectations in essential areas of responsibility, with key goals and objectives missed. Contribution was typically below that of peers or incumbents in comparable positions. | Performance often met, but did not consistently meet, position expectations. One (or more) of the most critical annual objectives was not met. Incumbent typically needs further coaching and development to fully meet position expectations. | Performance consistently met or exceeded Yale’s high standards and expectations. All critical annual goals were achieved. Incumbent widely recognized as a strong and valued contributor. | Performance noticeably exceeded expectations and made a unique contribution to the achievement of University, School, or Departmental objectives. This rating is awarded to under 20% of Yale incumbents and is typically reserved for the top performer(s) for the year. |

## **Goals & Keys Responsibilities**

This section provides employees and managers with the ability to comment on current year performance goals and/or key responsibilities.

### FYXX Goal #1

Click or tap here to enter goal description.

**Goal Description**

**Mid-Year Comments**

Click or tap here to enter mid-year comments.

**End-Year Comments**

Click or tap here to enter end-year comments.

| **Rating** |
| --- |
| |  |  | | --- | --- | |  | Exceptional | |  | Met/Exceeded Expectations | |  | Needs Improvement | |  | Unsatisfactory | |

### FYXX Goal #2

Click or tap here to enter goal description.

**Goal Description**

**Mid-Year Comments**

Click or tap here to enter mid-year comments.

**End-Year Comments**

Click or tap here to enter end-year comments.

| **Rating** |
| --- |
| |  |  | | --- | --- | |  | Exceptional | |  | Met/Exceeded Expectations | |  | Needs Improvement | |  | Unsatisfactory | |

### FYXX Goal #3

Click or tap here to enter goal description.

**Goal Description**

**Mid-Year Comments**

Click or tap here to enter mid-year comments.

**End-Year Comments**

Click or tap here to enter end-year comments.

| **Rating** |
| --- |
| |  |  | | --- | --- | |  | Exceptional | |  | Met/Exceeded Expectations | |  | Needs Improvement | |  | Unsatisfactory | |

### FYXX Goal #4

Click or tap here to enter goal description.

**Goal Description**

**Mid-Year Comments**

Click or tap here to enter mid-year comments.

**End-Year Comments**

Click or tap here to enter end-year comments.

| **Rating** |
| --- |
| |  |  | | --- | --- | |  | Exceptional | |  | Met/Exceeded Expectations | |  | Needs Improvement | |  | Unsatisfactory | |

### FYXX Goal #5

Click or tap here to enter goal description.

**Goal Description**

**Mid-Year Comments**

Click or tap here to enter mid-year comments.

**End-Year Comments**

Click or tap here to enter end-year comments.

| **Rating** |
| --- |
| |  |  | | --- | --- | |  | Exceptional | |  | Met/Exceeded Expectations | |  | Needs Improvement | |  | Unsatisfactory | |

## **Core Competencies**

Core competencies are essential for any job. They identify the observable and desirable behaviors. They are transferable skills and knowledge employees can take from one job to the next, within the same department or to another organization.

### Community / Customer Focus

**Competency Description**

Creates and maintains an attitude of service excellence, focusing on improving internal/external user experience and satisfaction. Have a sense of urgency in delivering services using established standards and procedures for request tracking and resolution. Demonstrate empathy for the community perspective of service delivery and prioritize improving the experience or service where possible.

**Mid-Year Comments**

Click or tap here to enter mid-year comments.

**End-Year Comments**

Click or tap here to enter end-year comments.

| **Rating** |
| --- |
| |  |  | | --- | --- | |  | Exceptional | |  | Met/Exceeded Expectations | |  | Needs Improvement | |  | Unsatisfactory | |

### Communication / Interaction with Others

**Competency Description**

Successfully leads and negotiates decision making to drive shared understanding and shared sense of direction across teams and individuals. Uses active listening, seeks feedback, and respects others’ points of view. With empathy and understanding, tells others what they need to know, even if the conversation is difficult. Considers other perspectives when negotiating conflict. Collaborates and works well with others across teams with an organizational perspective.

**Mid-Year Comments**

Click or tap here to enter mid-year comments.

**End-Year Comments**

Click or tap here to enter end-year comments.

| **Rating** |
| --- |
| |  |  | | --- | --- | |  | Exceptional | |  | Met/Exceeded Expectations | |  | Needs Improvement | |  | Unsatisfactory | |

### Expertise / Continuous Learning

**Competency Description**

Demonstrates, exercises and shares knowledge, skills, and competencies related to the functional and technical area(s) of responsibility. Takes initiative to attend and participate in both formal and informal training offerings to further develop personal and professional abilities. Seeks relevant Yale Center learning courses/classes, certifications, and other continuous learning opportunities along with creative thinking on delivery of broader team-based learning.

**Mid-Year Comments**

Click or tap here to enter mid-year comments.

**End-Year Comments**

Click or tap here to enter end-year comments.

| **Rating** |
| --- |
| |  |  | | --- | --- | |  | Exceptional | |  | Met/Exceeded Expectations | |  | Needs Improvement | |  | Unsatisfactory | |

### Diversity & Inclusion

**Competency Description**

Demonstrates behaviors that includes fairness, respect, inclusiveness, integrity, empathy and ethical conduct. Seeks to understand, respect and value individual differences. Respectfully listens to the opinions, concerns and ideas of others.

Leadership Competency – all the above +

Recognizes and supports diversity and inclusion as an important aspect of the work environment. Encourages and ensures continuous learning/improvement in diversity, inclusion, and cultural competence by promoting educational opportunities for staff members and fellow leaders. Knowledgeable about ITS & University values of diversity and inclusiveness.

**Mid-Year Comments**

Click or tap here to enter mid-year comments.

**End-Year Comments**

Click or tap here to enter end-year comments.

| **Rating** |
| --- |
| |  |  | | --- | --- | |  | Exceptional | |  | Met/Exceeded Expectations | |  | Needs Improvement | |  | Unsatisfactory | |

### Resourcefulness / Results

**Competency Description**

Uses available resources to efficiently perform day-to-day operations to deliver quality products / services. Demonstrates a sense of organizational accountability and fiscal responsibility. Uses Continuous Process Improvement (CPI) to review and refine University IT systems and processes to further operational and organizational goals.

**Mid-Year Comments**

Click or tap here to enter mid-year comments.

**End-Year Comments**

Click or tap here to enter end-year comments.

| **Rating** |
| --- |
| |  |  | | --- | --- | |  | Exceptional | |  | Met/Exceeded Expectations | |  | Needs Improvement | |  | Unsatisfactory | |

### Personal Accountability

**Competency Description**

Actively participates in setting goals and achieving them with a focus on quality and a university mindset. Delivers on commitments on time and within budget. Ensures our teams and others on whom we depend have the appropriate knowledge, skills and abilities to deliver on expectations. Acts with integrity and understands how delivery of their goals impact other teams and individuals.

**Mid-Year Comments**

Click or tap here to enter mid-year comments.

**End-Year Comments**

Click or tap here to enter end-year comments.

| **Rating** |
| --- |
| |  |  | | --- | --- | |  | Exceptional | |  | Met/Exceeded Expectations | |  | Needs Improvement | |  | Unsatisfactory | |

### Staff Development

**Competency Description**

Encourages participation in professional development and training activities promoting an environment of continuous learning. Provide opportunities for staff to learn, grow and be successful, aligning staff into positions that play to their strengths; builds staff capabilities through stretch opportunities, mentoring, coaching, and feedback. Uses annual review competency model to communicate and measure performance expectations and develop staff capability. Corrects unacceptable performance and holds staff accountable for behavior that is inconsistent with the competency model.

**Mid-Year Comments**

Click or tap here to enter mid-year comments.

**End-Year Comments**

Click or tap here to enter end-year comments.

| **Rating** |
| --- |
| |  |  | | --- | --- | |  | Exceptional | |  | Met/Exceeded Expectations | |  | Needs Improvement | |  | Unsatisfactory | |

## **Performance Summary**

### Mid-year Final Comments

Click or tap here to enter by manager.

**By Manager**

**By Employee**

Click or tap here to enter by employee.

| ***Overall Performance for the Year***  *Include how results were achieved (i.e., Leadership, Teamwork, Organizational Progress, etc.)* | ***Rating*** |
| --- | --- |
|  | |  |  | | --- | --- | |  | *Exceptional* | |  | *Met/Exceeded Expectations* | |  | *Needs Improvement* | |  | *Unsatisfactory* | |

### Signatures

*Print and complete this section*

Your signature on this form acknowledges that you have read the information and your supervisor has reviewed it with you.

**Note:** In accordance with CT State Law, you have the right, should you disagree with any of the information contained in this document, to submit a written statement explaining your position. This statement will be maintained as part of your personnel file. Once signed and completed, a copy of this form, along with any attachments, should be sent to your HR Generalist.

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Manager Printed Name

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Manager Signature

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Employee Printed Name

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Employee Signature

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date