

###### PERFORMANCE MANAGEMENT PROGRAM

###### Planning and Evaluation Form

**AUTOMATIC CALCULATIONS VERSION**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Evaluation Period: | From: |       | To: |       | [ ]  | Annual evaluation |
|  |  |  |  |  | [ ]  | Other reason for evaluation – explain: |
| Campus Box: |       |  |       |
| Employee Name: |       | Employee 6-digit ID #: |       |
| Job Title: |       | Position #: |       |
| Work Unit: |       | Department ID #: |       |
| Supervisor Name: |       | Position #: |       |
| Reviewer Name: |       | Position #: |       |
| Decision Making Authority: |       | Position #: |       |
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**PERFORMANCE MANAGEMENT PLANNING SECTION**

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| This position P.D.Q. (job description) was reviewed by the supervisor and is current and accurate. | [ ]  | Yes | [ ]  | No |
| This position supervises Classified Staff. A supervisory factor is included as a goal/objective. | [ ]  | Yes | [ ]  | N.A. |
| Supervisor Signature: |  | Date: |  |
| Reviewer Signature: |  | Date: |  |
| **EMPLOYEE MUST CHECK ONE:** |  | I *agree* with this plan |  | I *disagree* with this plan |
| Employee Signature: |  | Date: |  |
|  |

**COACHING AND PROGRESS REVIEW SECTION**

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| At least one coaching, or progress review, meeting is required for each evaluation period; more are recommended. Indicate the date each meeting was held. Both the supervisor and employee should initial next to each date. The coaching/progress review notes page of this form provides space for documenting the issues discussed during the year. |
| Date: |  | Supervisor’s Initials: |  | Employee’s Initials: |  |
| Date: |  | Supervisor’s Initials: |  | Employee’s Initials: |  |
| Date: |  | Supervisor’s Initials: |  | Employee’s Initials: |  |
|  |  |  |  |

**EVALUATION RATING SECTION**

|  |  |
| --- | --- |
| **Final Rating (1-5)** | **Conversion of Total Numeric Score to Descriptive Rating** |
|  **1** | 100-149Unacceptable(Level 1) | 150-249Need Improvement(Level 2) | 250-349Effective(Level 3) | 350-449Highly Effective(Level 4) | 450-500Exceptional(Level 5) |

Supervisor Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_

Reviewer Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_

**EMPLOYEE MUST CHECK ONE: I agree with this evaluation I disagree with this evaluation**

Employee Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_

Note: checking ‘I disagree’ does not automatically prompt, nor does checking ‘I agree’ preclude one from, pursuing the dispute resolution process. For more information, please see the dispute resolution process document on the last page of this form.

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| University of Colorado Denver Mission of the UniversityThe University of Colorado Denver is a diverse teaching and learning community that creates, discovers and applies knowledge to improve the health and well-being of Colorado and the World.   |
| **The Mission of the Work Unit**      |
| **The Role of This Position**The position’s role in the accomplishment of the mission and objectives of the work unit and the campus is to:*(Use question 1.C, "Briefly summarize the purpose of this position," from the PDQ or similar information from the job description.)*      |

###### Key to Rating Level

**Definition of Level 5 (Exceptional):** Employees at this level consistently make extraordinary contributions through superior performance on key goals, serve as a role model of organizational values, and contribute significantly to the mission of the Department. Peers, immediate supervisors, higher-level management, and others recognize and depend upon the employee’s level of performance. An extraordinary level of achievement and commitment in terms of quality and time, technical skills and knowledge, ingenuity, creativity, and initiative is exhibited at this level. The employee demonstrates exceptional job mastery in all major areas of responsibility and their contributions to the organization are of marked excellence.

**Definition of Level 4: (Highly Effective):** Employees at this level demonstrate highly effective performance by making significant contributions and impact on the goals of the Department. The employee consistently models organizational values to others and performance at this level exceeds the expectations of their position. Colleagues rely on these employees for advice on process or subject matter expertise. All goals, objectives, and targets are consistently achieved above the established standards.

**Definition of Level 3: (Effective):** Employees at this level reliably and consistently meet all the expectations, standards, requirements, and objectives of the employee’s position. They demonstrate organizational values, along with a willingness and ability to grow for the benefit of the Department. At this level, performance meets expectations in terms of quality of work, efficiency, and timeliness with the most critical goals being met.

**Definition of Level 2: (Needs Improvement):** At this level, employee performance and/or behavior do not consistently meet minimum expectations of what is expected of the employee’s position. While the employee shows capability and willingness to progress, they may require development in a key skill area(s) to be fully effective in the role. Employee’s failure to exhibit marked improvement may result in performance management.

**Definition of Level 1: (Unacceptable):** At this level, employee performance and/or behavior do not meet minimum job expectations of the position. The employee does not meet key goals and/or does not demonstrate competence in critical job skills. Immediate and sustained performance improvement is needed. Employee’s failure to exhibit immediate marked improvement will result in corrective and/or disciplinary action.

**For Automatic Calculations**

This form is setup to automatically transfer the goal/ objective weights and the ratings to the summary table. When you are finished entering the numbers for weights and/or ratings, **you must tab out of the current cell or select a different cell** to have the summary table updated (do not hit “ENTER” to move between cells – it may cause errors in calculation). To edit the form, click on ‘Review’ tab and select ‘Restrict Editing.’ Then select ‘Stop Protection’ (bottom right on screen) and you may edit/remove language. Once you are done editing, please select ‘Yes, Start Enforcing Protection’ and hit ‘Enter’ or click ‘OK’ when the password prompt comes up (to select a blank password). Please note that if you delete any gray fields, it may impact the automatic calculation functionality. If the form ceases to work, please call Human Resources or download a new form. The Final Rating on page 1 will show as “1” until you add weights and ratings.

**GOALS AND OBJECTIVES ASSOCIATED WITH SUCCESS IN THIS POSITION**

**“Goal or objective”** is a specific statement or requirement.

 **“Measurement method”** reflects the evaluation basis for the expected results.

**“Results achieved”** are the accomplishments of the employee during the evaluation period.

Weight is the percentage of that goal to the overall score. Decimals are highly encouraged when determining ratings, e.g. 4.75.

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| --- | --- | --- | --- |
| **1** | **Goal or objective:**       | **Results achieved:**       | Level 5 – ExceptionalLevel 4 – Highly EffectiveLevel 3 – EffectiveLevel 2 – Needs ImprovementLevel 1 – Unacceptable |
| **Measurement method:**       |
| **Weight of goal or objective:**       | **Goal or objective rating:**      |

|  |  |  |  |
| --- | --- | --- | --- |
| **2** | **Goal or objective:**       | **Results achieved:**       | Level 5 – ExceptionalLevel 4 – Highly EffectiveLevel 3 – EffectiveLevel 2 – Needs ImprovementLevel 1 – Unacceptable |
| **Measurement method:**       |
| **Weight of goal or objective:**       | **Goal or objective rating:**      |

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| --- | --- | --- | --- |
| **3** | **Goal or objective:**       | **Results achieved:**       | Level 5 – ExceptionalLevel 4 – Highly EffectiveLevel 3 – EffectiveLevel 2 – Needs ImprovementLevel 1 – Unacceptable |
| **Measurement method:**       |
| **Weight of goal or objective:**       | **Goal or objective rating:**      |

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| --- | --- | --- | --- |
| **4** | **Goal or objective:**       | **Results achieved:**       | Level 5 – ExceptionalLevel 4 – Highly EffectiveLevel 3 – EffectiveLevel 2 – Needs ImprovementLevel 1 – Unacceptable |
| **Measurement method:**       |
| **Weight of goal or objective:**       | **Goal or objective rating:**      |

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| --- | --- | --- | --- |
| **5** | **Goal or objective:**       | **Results achieved:**       | Level 5 – ExceptionalLevel 4 – Highly EffectiveLevel 3 – EffectiveLevel 2 – Needs ImprovementLevel 1 – Unacceptable |
| **Measurement method:**       |
| **Weight of goal or objective:**       | **Goal or objective rating:**      |

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| **6** | **Goal or objective:**       | **Results achieved:**       | Level 5 – ExceptionalLevel 4 – Highly EffectiveLevel 3 – EffectiveLevel 2 – Needs ImprovementLevel 1 – Unacceptable |
| **Measurement method:**       |
| **Weight of goal or objective:**       | **Goal or objective rating:**      |

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| --- | --- | --- | --- |
| **7** | **Goal or objective:**       | **Results achieved:**       | Level 5 – ExceptionalLevel 4 – Highly EffectiveLevel 3 – EffectiveLevel 2 – Needs ImprovementLevel 1 – Unacceptable |
| **Measurement method:**       |
| **Weight of goal or objective:**       | **Goal or objective rating:**      |

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| --- | --- | --- | --- |
| **8** | **Goal or objective:**       | **Results achieved:**       | Level 5 – ExceptionalLevel 4 – Highly EffectiveLevel 3 – EffectiveLevel 2 – Needs ImprovementLevel 1 – Unacceptable |
| **Measurement method:**       |
| **Weight of goal or objective:**       | **Goal or objective rating:**      |

**Include only if position supervises classified staff**

|  |  |  |  |
| --- | --- | --- | --- |
| **9** | **Supervisor Accountability Goal:** All supervisors of classified staff are responsible for:* Completing performance plans
* Conducting at least one performance coaching session per year
* Completing a written performance evaluation for each classified staff employee

Supervisors who do not comply will be subject to sanctions including corrective action, ineligibility for a performance award, and/or a five-day unpaid suspension. | **Results achieved:**       | Level 5 – ExceptionalLevel 4 – Highly EffectiveLevel 3 – EffectiveLevel 2 – Needs ImprovementLevel 1 – Unacceptable |
| **Measurement method:**       |
| **Weight of goal or objective:**       | **Goal or objective rating:**      |

**CORE COMPETENCIES**

The following core competencies have been defined by the State Personnel Director for inclusion in the performance plans of every employee classified in the State Personnel System. Mastery of the core competencies will vary depending upon the background and duties of an employee. A score for each competency is required. Decimals may be used when determining rating, i.e., 2.25. For examples of Measurement Methods, see last two pages of form.

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| **1** | **Communication:** The employee effectively communicates by actively listening and sharing relevant information with co-workers, supervisor(s) and students and other external constituents so as to anticipate problems and ensure effectiveness of the University or campus.  | Results achieved:       | Level 5 – ExceptionalLevel 4 – Highly EffectiveLevel 3 – EffectiveLevel 2 – Needs ImprovementLevel 1 – Unacceptable |
| **Measurement Factors:**[ ]  Demonstrates good listening skills[ ]  Uses appropriate language and terminology[ ]  Speaks in a manner that will be understood, is courteous, and effective[ ]  Communicates to ensure others are informed and current[ ]  Is considerate of the communication skills of others [ ]  OTHER       | **Goal or objective rating:**      |
| **Weight of core competency:**       |
|  |  |  |  |
| **2** | **Interpersonal Skills:** The employee interacts effectively with others to establish and maintain smooth working relations. | Results achieved:       | Level 5 – ExceptionalLevel 4 – Highly EffectiveLevel 3 – EffectiveLevel 2 – Needs ImprovementLevel 1 – Unacceptable |
| **Measurement Factors:** [ ]  Maintains smooth working relations with others[ ]  Is helpful and supportive of others as necessary[ ]  Is understanding of the feelings and needs of co-workers and others[ ]  Contributes to maintaining a high level of morale and motivation[ ]  Is appreciative of the diversity of coworkers, customers, students, and visitors[ ]  Supports the institution’s commitment to diversity[ ]  OTHER       | **Goal or objective rating:**      |
| **Weight of core competency:**       |
|  |  |  |  |
| **3** | **Accountability:** The employee demonstrates responsible personal and professional conduct, which contribute to the overall goals and objectives of the University or campus.  | Results achieved:       | Level 5 – ExceptionalLevel 4 – Highly EffectiveLevel 3 – EffectiveLevel 2 – Needs ImprovementLevel 1 – Unacceptable |
| **Measurement Factors**: [ ]  Complies with unit policies relating to attire or dress code[ ]  Uses breaks and break times appropriately [ ]  Avoids conducting personal business during work hours[ ]  Represents the work unit to others in person, by phone, e-mail, etc. in a credible manner[ ]  Complies with institutional policies[ ]  Complies with work unit standards for requesting leave and calling in sick[ ]  Accepts schedule changes and responds to special situations[ ]  OTHER       | **Goal or objective rating:**      |
| **Weight of core competency:**       |

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| --- | --- | --- | --- |
| **4** | **Job Knowledge:** The employee is skilled in job-specific knowledge which is necessary to provide the appropriate quantity and quality of work in a timely and efficient manner. | Results achieved:       | Level 5 – ExceptionalLevel 4 – Highly EffectiveLevel 3 – EffectiveLevel 2 – Needs ImprovementLevel 1 – Unacceptable |
| **Measurement Factors:** [ ]  Demonstrates the necessary knowledge, skills and abilities to complete work assignments[ ]  Meets deadlines in completing work assignments[ ]  Produces quality work [ ]  Work efforts and product contribute to a higher quality environment[ ]  Consistently meets performance expectations[ ]  OTHER        | **Goal or objective rating:**      |
| **Weight of core competency:**       |
|  |  |  |  |
| **5** | **Customer Service:** The employee works effectively with internal/external constituents to satisfy service expectations. | Results achieved:       | Level 5 – ExceptionalLevel 4 – Highly EffectiveLevel 3 – EffectiveLevel 2 – Needs ImprovementLevel 1 – Unacceptable |
| **Measurement Factors:**[ ]  Provides prompt and friendly service to internal and external customers[ ]  Helps identify customer needs through courteous questioning and a sincere desire to be helpful[ ]  Follows up with customers, as appropriate, to ensure satisfaction[ ]  Considers and recommends alternatives to customers as appropriate[ ]  Is as helpful with telephone contacts as with in-person interactions[ ]  Participates in Campus and/or community service projects as appropriate[ ]  OTHER       | **Goal or objective rating:**      |
| **Weight of core competency:**       |
|  |  |  |  |
| **6** | **Extra Core Competency (if needed):**      | Results achieved:       | Level 5 – ExceptionalLevel 4 – Highly EffectiveLevel 3 – EffectiveLevel 2 – Needs ImprovementLevel 1 – Unacceptable |
| **Measurement Factors:** [ ]       [ ]       [ ]       [ ]       [ ]         | **Goal or objective rating:**      |
| **Weight of core competency:**       |

**Instructions for Completing the Summary of Performance table:**

**For Performance Plan**:

* On page 5 and 6, develop goals or objectives for the position and methods to measure results. (not all goals/objectives need to be completed)
* On page 7 and 8, for each of the state-mandated core competencies, check all factors that apply to the position.
* Assign a weight to each goal or objective, and to each core competency (each core competency must have a weight of at least 1), to identify its relative value to performance by the position. Note that the sum for all weights must equal 100.

**For Performance Evaluation:**

* On pages 5 through 8, identify the results achieved by the employee for each goal or objective and for each state-mandated core competency.
* Assign a performance rating level (exceeding expectations, meeting expectations, not meeting expectations) for the results achieved for each goal or objective and for each state-mandated core competency. Record this rating on pages 5 through 8.
* For each row: Multiply the pre-assigned weight times the numeric equivalent of the rating (1 – 5) to determine the numeric score for each goal or objective and each core competency. Decimals may be used to determine rating, i.e., 2.25.
* Total the individual numeric scores to determine the overall points achieved by the employee. Determine the employee’s overall

rating level using the conversion printed below the summary table.

**SUMMARY OF PERFORMANCE**

|  |  |  |  |
| --- | --- | --- | --- |
| **GOAL OR OBJECTIVE** | **Weight** | **Numeric Equivalent of Rating****(1 – 5)**  | **Numeric Score** |
| Goal or Objective 1 |   |   | 0.00 |
| Goal or Objective 2 |   |   | 0.00 |
| Goal or Objective 3 |   |   | 0.00 |
| Goal or Objective 4 |   |   | 0.00 |
| Goal or Objective 5 |   |   | 0.00 |
| Goal or Objective 6 |   |   | 0.00 |
| Goal or Objective 7 |   |   | 0.00 |
| Goal or Objective 8 |   |   | 0.00 |
| Goal or Objective 9 |   |   | 0.00 |
| Communication |   |   | 0.00 |
| Interpersonal Skills |   |   | 0.00 |
| Accountability |   |   | 0.00 |
| Job Knowledge |   |   | 0.00 |
| Customer Service |   |   | 0.00 |
| Extra Core Competency (if needed) |   |   | 0.00 |
| **TOTAL** | **0** | **Total Numeric Score ->** | **0.00** |
|  | **MUST EQUAL 100** | **Final Rating ->** | **1** |

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| **Conversion of Total Numeric Score to Descriptive Rating** |
| 100-149Unacceptable(Level 1) | 150-249Needs Improvement(Level 2) | 250-349Effective(Level 3) | 350-449Highly Effective(Level 4) | 450-500Exceptional(Level 5) |

**NARRATIVES:**

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| Training Plans:      |

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| Planning Narrative:      |

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| Evaluation Narrative:      |

**COACHING/PROGRESS REVIEW NOTES:**

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| Date:      Issues Discussed:       |
| Date:      Issues Discussed:       |
| Date:      Issues Discussed:       |

**DISPUTE RESOLUTION PROCESS**

This overview of the Dispute Resolution Process is an abbreviated version of the formal process that is available in its entirety at your campus Human Resources department. Before initiating this process, you are encouraged to have a meeting with your supervisor to identify and possibly rectify the issue about which you are concerned.

**What Issues are Disputable?**

The State Personnel Director has defined the specific performance management matters that may be disputed by an employee and has specified the stages at which these matters will be reviewed. They are:

1. The individual final overall performance evaluation, including lack of a final overall evaluation
2. The application of the university’s performance management program to the individual employee’s plan and/or final overall evaluation

Please note that the first issue must be decided at the first stage, and is **not reviewable further.** Issue 2, if not resolved at the campus level, is reviewable at the second stage.

**What Issues are Not Disputable?**

1. The content of the University’s performance management program (or an approved campus modification of the program);

2. Matters related to the funds appropriated;

3. The performance evaluations and merit pay of *other* employees;

**First Stage—Internal: University of Colorado Campus Level**

To initiate the internal review process, the employee must submit a review request on the standard university form to the Decision Making Authority. When disputing the individual final overall performance evaluation rating, the written request must be filed within five (5) working days after the meeting at which the rater formally presents the employee with his/her final overall performance evaluation and during which the employee and rater discuss the performance rating. Copies of the written request must be submitted to the supervisor and to Employee Relations and Performance (PerformanceManagement@cuanschutz.edu).

Unless there are extraordinary circumstances, the Decision Making Authority or designee must, within five working days from receipt of the form, meet with the employee, the supervisor, and with any other persons whom the employee or the supervisor deem to have pertinent information. The Decision Making Authority remains responsible for scheduling the meeting with the affected parties and for adhering to the schedule for completion of the review**.**  After the meeting, the Decision Making Authority has five working days to render a decision.

**Second Stage—External: State Personnel Director**

The second stage applies to issue 2 only. If unsatisfied with the decision of the Decision Making Authority the employee may file a written request for external review with the State Personnel Director within five working days from the date the internal decision is received. This request must be submitted on the standard Consolidated Appeal/Dispute Form available from Employee Relations and Performance. Mail, hand-deliver, or fax the form to:

State Personnel Board

1525 Sherman Street, 4thFloor

Denver, CO 80203

Fax: 303-866-5038

The request must include a copy of the original written performance management issue(s) raised by the employee and the final written decision from the internal review stage. A copy of this written request also must be sent to Employee Relations and Performance (PerformanceManagement@cuanschutz.edu).

This request will be screened based upon specific criteria established by the State Personnel Director, and if it is determined that further review is not warranted, that decision is final and binding and the employee will be notified accordingly. If, however, further review is warranted, the Director shall select a qualified neutral third party to review the decision who must within thirty days issue a written decision, which is final and binding.

Examples of Core Competency Measures

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| Following are examples of the types of measures that may be included in planning Core Competency performance. It should be understood between the supervisor and employee that while efforts are made at describing qualities of performance, for the most part, competencies are observed and evaluated by the supervisor. When measures are created an effort should be made to describe the two (2) levels of performance. As performance criteria are developed consideration should be given to the classification of the position and the types of expectations that exist for that type and level of work. Consideration should first be given to performance expectations at the “Meeting Expectations” level. “Meeting Expectations” performance is that level that satisfies the requirements of the position. Measures are then created for the highest level of performance. Typically, “Exceeding Expectations” requires higher levels of skill, knowledge, and/or effort for the classification of the position. |

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| **Communication:** The employee effectively communicates by actively listening and sharing relevant information with co-workers, supervisor(s) and students and other external constituents so as to anticipate problems and ensure effectiveness of the University or campus. |

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| --- | --- |
| Meeting Expectations | Exceeding Expectations |
| * Writing skills meet the needs of the assignment.
 | * Writing skills are substantially beyond expectations.
 |
| * Oral Communication skills meet the needs of the assignment.
 | * Oral Communication skills are substantially beyond expectations.
 |
| * Messages are relayed in a professional and courteous manner
 | * Anticipates problems and takes necessary action with appropriate individuals.
 |
|  | * Employee follows up to insure that messages are received and understood.
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| **Interpersonal Skills:** The employee interacts effectively with others to establish and maintain smooth working relations. |

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| Meeting Expectations | Exceeding Expectations |
| * The employee is pleasant and courteous in all interactions.
 | * The employee is willing to extend him/herself in providing help during crunch times, is flexible and accommodating.
 |
| * The employee establishes and maintains relationships that are appropriate for the level and type of work.
 | * Makes continuous effort to insure that relationships are not only maintained but fostered and supported.
 |
| * Rarely involved in interpersonal disputes or customer conflicts.
 | * Resolves interpersonal conflicts without assistance.
 |
|  | * Demonstrates extra effort to maintain more complicated relationships.
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| **Accountability:** The employee demonstrates responsible personal and professional conduct, which contribute to the overall goals and objectives of the University or campus. |

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| --- | --- |
| Meeting Expectations | Exceeding Expectations |
| * The employee accepts responsibility for actions, work, and behavior.
 | * The employee takes independent action within the expectations of the work assignment, but understands limitations of independent action.
 |
| * The employee accomplishes assignments within established time frames.
 | * The employee frequently completes assignments well before deadlines or due dates without a loss of quality or quantity.
 |
| * The employee is reliable in attendance and attention to work rules.
 |  |
| * The employee uses equipment and resources appropriately
 |  |
| * Is flexible with regard to work hours and assignment changes.
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| **Job Knowledge:** The employee is skilled in job-specific knowledge which is necessary to provide the appropriate quantity and quality of work in a timely and efficient manner. |

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| --- | --- |
| Meeting Expectations | Exceeding Expectations |
| * The employee has acquired the skills and knowledge necessary for the assignment.
 | * Asks for additional training for the purpose of enhancing job knowledge and skill
 |
| * Develops new job knowledge or skills as changes occur or as necessary.
 | * Is able to mentor/train others on skills and knowledge of the assignment
 |
|  | * Identifies methods for enhancing accomplishment of the assignment and makes recommendations to the supervisor.
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| **Customer Service:** The employee works effectively with internal/external constituents to satisfy service expectations. |

Note: Complaints should not be used as a primary determinant in evaluating this factor. Work units may wish to provide customer service training to employees in an effort to identify service problems and develop strategies for dealing with them. Work units may also choose to develop a survey or questionnaire for customers to complete in assessing the quality of service provided.

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| Meeting Expectations | Exceeding Expectations |
| * Demonstrates an understanding of the customer service needs of the position and works towards achieving them.
 | * Identifies additional methods for meeting customer needs and makes appropriate recommendations.
 |
| * Consistently speaks to customers in a friendly and informative tone.
 | * Provides extra effort or extra time with customers to resolve customer needs.
 |
|  | * Consistently serves as a resource to others in resolving particularly difficult customer service problems
 |