UTSA People Excellence

Performance Management
Rating Guide

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Rating Scale

What is a performance management rating scale? A Performance Management Rating Scale is a standardized way of evaluating employee performance. The rating scale includes descriptors specific to performance expectations that are used to assess the employee's level of performance.

What rating scale is used at UTSA?

There are rating scales used in the evaluation for both the core values and the competencies. The summary rating scale for the overall performance evaluation is as follows:

1 - Does Not Meet Expectations: Needs significant improvement in some or most areas.

2 - Somewhat Meets Expectations: Often meets expectations but needs improvement in some areas.

3 - Meets Expectations: Strong, solid performer who meets expectations and occasionally exceeds expectations.

4 - Exceeds Expectations: Exceptional performer who consistently exceeds expectations.

5 - Role Model: Consistently performs above all that is required; makes unique contributions and achieves impactful accomplishments.

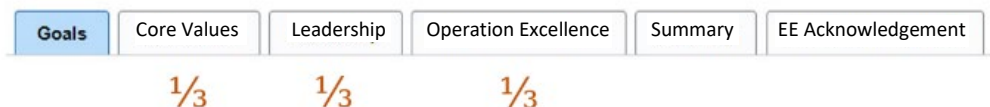| Overall Staff Rating	performance - Overall Score
Role Model	4.50 — 5
Exceeds Expectations	3.50 — 4.49
Meets Expectations	2.50 — 3.49
Somewhat meets expectations	1.50 — 2.49
Does not meet expectations	<1.50

How is each tab weighted for the overall score?
Each tab is weighted as 1/3 of the total score.

Individual Contributor

| Goals | Core Values | Operation Excellence | Core Competencies | Summary | EE Acknowledgement |

1/3   1/3   1/3

People Leader

| Goals | Core Values | Leadership | Operation Excellence | Summary | EE Acknowledgement |

1/3   1/3   1/3

Executive

| Goals | Performance Factors | Core Values | Leadership | Summary | EE Acknowledgement |

1/3   1/3   1/3

Understanding the Core Values

These core values are the foundations of everything that we do.

UTSA Competency-Based Model

UTSA's competency-based performance management model focuses on assessing and developing employees based on specific competencies or skills deemed essential for success in a particular role or within the university. Core values play a crucial role in shaping this model because they serve as a compass for the university in providing a framework for decision-making and employee interaction.

Implementing a competency-based performance management model requires a commitment to ongoing communication, development, and alignment with university's mission and vision.

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Understanding the Competencies

If our core values are "the foundations of everything that we do," our core competencies are "how we get it done."

Individual Contributor Competencies

Operational Excellence
- Functional and Technical Skills
- Action Oriented

Core Competencies
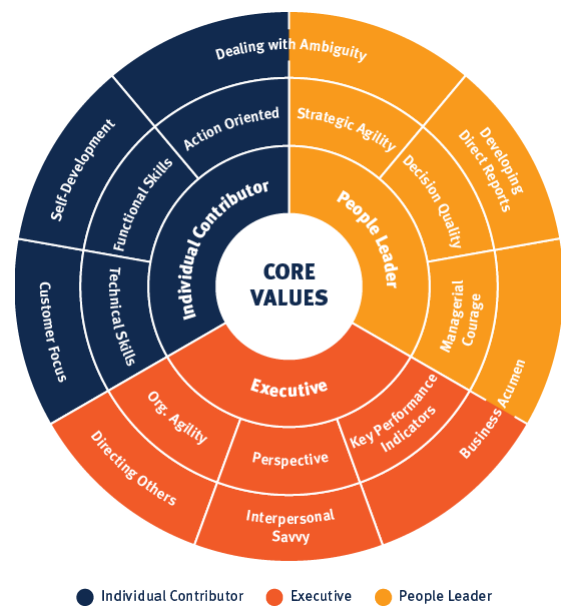- Customer Focus
- Dealing with Ambiguity
- Self-Development

People Leader Competencies

Operational Excellence
- Strategic Agility
- Business Acumen

Leadership
- Dealing with Ambiguity
- Managerial Courage
- Developing Direct Reports
- Decision Quality

Executive Competencies

Leadership
- Organizational Agility
- Business Acumen
- Perspective
- Interpersonal Savvy
- Directing Others
- Key Performance Indicators (KPIs)

Core Values Rating Scale Descriptors

Integrity

Demonstrates reliability and takes responsibility for their own actions. Follows through on commitments, maintains confidentiality and supports the values of the university.

1 - Does Not Meet Expectations – Does not demonstrate reliability or take responsibility for their own actions. Fails to maintain confidentiality; does not follow through on commitments; demonstrates a lack of support for the values of the university

2 - Somewhat Meets Expectations - Occasionally demonstrates reliability and at times fails to follow through on commitments. Inconsistently takes responsibility for their own actions. Sometimes struggles to identify situations requiring confidentiality. Occasionally demonstrates a lack of support for the values of the university.

3 - Meets Expectations – Demonstrates reliability and follows through on commitments with minimal follow-up and guidance. Takes responsibility for their own actions. Maintains confidentiality. Demonstrates support for the values of the university.

4 - Exceeds Expectations – Consistently demonstrates reliability and follows through on commitments without needing follow-up and guidance. Takes responsibility for their own actions and comes prepared with solutions. Maintains confidentiality and identifies potential risks. Demonstrates the values of the university through their actions.

5 - Role Model – Models reliability and follows through on commitments, anticipating needs before they arise. Takes responsibility for their own actions and takes a proactive approach to implement long-term solutions. Actively works to consider areas where confidentiality is critical, and acts on potential risks. Champions the values of the university and influences others.

Excellence

Commitment to delivering consistently high-quality results through superior performance.

1 - Does Not Meet Expectations – Does not deliver expected results and is resistant to applying feedback from coaching.

2 - Somewhat Meets Expectations – Delivery of results is inconsistent and requires regular coaching and follow-up to achieve results.

3 - Meets Expectations - Consistently delivers high-quality results. Is open to feedback and coaching to ensure superior performance.

4 - Exceeds Expectations - Sets new standards and looks for new ways to deliver high-quality results. Sets stretch goals that strive for continuous improvement. Actively seeks feedback and coaching to ensure superior performance.

5 - Role Model - Develops and implements new standards of excellence. Takes appropriate steps to monitor excellence in own work. Sets stretch goals and delivers exceptional results. Is sought after by others for feedback and coaching.

Inclusiveness

Demonstrates the ability to engage respectfully and productively with those that have perspectives which vary from their own.

1 - Does Not Meet Expectations - Consistently has difficulty successfully interacting with those that have perspectives which vary from their own. Does not seek opportunities to engage with others of varying viewpoints or workstyles.

2 - Somewhat Meets Expectations - Inconsistently demonstrates the ability to engage respectfully and productively with those that have perspectives which vary from their own. Exhibits limited interest in including others of varying viewpoints or workstyles.

3 - Meets Expectations - Consistently demonstrates the ability to engage respectfully and productively with those that have perspectives which vary from their own.

4 - Exceeds Expectations – Seeks opportunities to involve others with varying viewpoints to improve results. Actively engages respectfully and productively with those that have perspectives which vary from their own.

5 - Role Model - Models behavior that champions perspectives from all individuals, striving for superior outcomes. Exemplifies the ability to engage respectfully and productively with all individuals and takes steps to address inappropriate behavior by others when necessary.

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Respect

Treating others with civility, courtesy and consideration; recognizing the value of each individual. Exhibits behavior that aligns with the university's expectations.

1 - Does Not Meet Expectations - Does not exhibit courtesy and consideration toward others and demonstrates behaviors that are disrespectful or dismissive.

2 - Somewhat Meets Expectations – Inconsistently displays respectful conduct, courtesy, and consideration towards others. There are opportunities for improvement in their interactions with others.

3 - Meets Expectations – Consistently treats others with civility, courtesy, and consideration; recognizing the value of each individual. Exhibits behavior that aligns with the university's expectations.

4 - Exceeds Expectations – Actively fosters positive relationships and responds appropriately to the various needs and feelings of others in each unique situation.

5 - Role Model – Sets the standard for creating and maintaining positive relationships. Promotes an environment of civility, courtesy, and consideration where everyone feels valued and respected. Identifies and resolves situations where conflict exists.

Collaboration

Working cooperatively and effectively with others towards shared goals and the achievement of high-quality results through collective efforts.

1 - Does Not Meet Expectations – Creates barriers for effective collaboration and exhibits rigidity that negatively impacts the team's ability to achieve high-quality results.

2 - Somewhat Meets Expectations – Demonstrates inconsistent effort or ability in collaborating with others. Engages with others only when necessary or prompted to by someone else.

3 - Meets-Expectations – Consistently works collaboratively to achieve high-quality results and values the opinions, ideas, and expertise of others.

4 - Exceeds Expectations – Actively seeks the opinions, ideas and expertise of others and values opportunities to work collaboratively. Credits others for their contributions and accomplishments.

5 - Role-Model - Inspires and motivates others to work collaboratively in pursuit of shared goals and high-quality results. Facilitates open dialogue with a variety of stakeholders to gather input, ensuring a broad spectrum of perspectives are represented.

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Innovation

Encouraging ingenuity, creativity and discovery.

1 - Does Not Meet Expectations - Accepts processes as they are and does not identify areas ofimprovement. Discourages the creative initiative of others.

2 - Somewhat Meets Expectations – Inconsistently identifies areas of improvement and, at times is resistant to new ideas.

3 - Meets Expectations – Appropriately identifies areas of improvement and contributes new ideas.

4 - Exceeds Expectations – Actively seeks and offers new ideas in the pursuit of continuous improvement. Takes risks in recommending creative solutions or ideas.

5 - Role Model - Proactively explores, presents, and encourages novel ideas that foster ongoing enhancements. Contributions anticipate and address future needs making them a driving force in creating a culture of innovation.

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Core Competencies Rating Scale Descriptors

Individual Contributors

Below are the competencies established for those identified as Individual Contributors. Individual Contributors are defined as any person in non-supervisory roles and/or those who only have student direct reports only.

Customer Focus

Dedicated to meeting the needs of internal and external customers; gains customer information to provide recommendations for improvements in products and services; establishes and maintains effective relationships with customers and gains their trust and respect.

1 - Does Not Meet Expectations - Does not meet the needs of internal and external customers; does not establish and maintain effective relationships with customers creating a lack of trust and respect

2 - Somewhat Meets Expectations - Sometimes meets the needs of internal and external customers, but usually requires coaching and encouragement to do so; inconsistent at establishing and maintaining effective relationships, creating trust and respect with some customers.

3 - Meets Expectations - Meets the needs of internal and external customers; gains customer information to provide recommendations for improvements in products and services; establishes and maintains effective relationships with customers and gains their trust and respect through consistent delivery in services.

4 - Exceeds Expectations - Anticipates the needs of internal and external customers; actively seeks customer feedback to provide recommendations for improvements in products and services; establishes and maintains effective relationships with customers through personalized interactions leading to increased trust and respect.

5 - Role Model – Proactively addresses the needs of internal and external customers; utilizes customer feedback to enhance the customer experience and improve products and services; establishes strong relationships with customers based on trust and mutual respect; models personalized interactions through empathy and compassion leading to customers feeling valued and appreciated.

Dealing with Ambiguity

Can effectively manage and adapt to change; makes decisions and takes action even in the absence of complete information; can comfortably handle uncertainty.

1 - Does Not Meet Expectations - resistant to change; demonstrates inability to navigate uncertain situations and does not take action in the absence of complete information.

2 - Somewhat Meets Expectations - Can manage and adapt to change, but usually requires guidance and supervision to do so; often requires additional information and support to navigate situations of uncertainty in order to take action.

3 - Meets Expectations - Can effectively manage and adapt to change; makes decisions and takes action even in the absence of complete information; can comfortably handle uncertainty

4 - Exceeds Expectations – Embraces, manages, and adapts comfortably to change; offers solutions to challenges that support decision making and confidently takes action in the absence of complete information

5 - Role Model – Confidently leads and influences others throughout the change process; proactively makes decisions, addresses challenges and engages stakeholders to support navigation of ambiguous situations.

Functional and Technical Skills

Demonstrates proficiency in specific job-related tasks, processes, or areas of knowledge necessary for carrying out job responsibilities effectively. Proficiency in using tools, software, equipment, or methodologies relevant to the job role, contributing to effective job performance.

1 - Does Not Meet Expectations - Lacks understanding and does not show proficiency in job-related tasks and basic usage of tools, software, or equipment relevant to the job.

2 - Somewhat Meets Expectations - Inconsistently demonstrates understanding of job-related tasks and often requires guidance and support. Has a basic understanding of tools, software, or equipment needed and inconsistently applies that knowledge to the role.

3 - Meets Expectations - Shows proficiency in specific job-related tasks, processes and tools necessary for carrying out job responsibilities contributing to effective job performance.

4 - Exceeds Expectations - Exhibits exceptional understanding and proficiency in job-related tasks, consistently achieving high-quality results. Demonstrates expertise in using tools, software, or equipment, effectively troubleshooting issues and providing support to others.

5 - Role Model Shows expertise in job-related tasks, setting a standard for others to follow. Displays mastery in using tools, software, or equipment, modeling innovation and serving as a go-to resource for others.

Action Oriented

A self-starter ready to take initiative, make decisions, and actively address tasks and challenges to achieve desired outcomes.

1 - Does Not Meet Expectations - Does not demonstrate initiative in taking action or addressing tasks and challenges. Requires frequent direction and guidance to complete tasks effectively. Hesitant in approaching new tasks or projects.

2 - Somewhat Meets Expectations - Inconsistently demonstrates initiative in taking action or addressing tasks and challenges. Requires some direction and guidance to complete tasks effectively. May require prompting in approaching tasks or projects.

3 - Meets Expectations - A self-starter ready to take initiative, make decisions, and actively address tasks and challenges to achieve desired outcomes.

4 - Exceeds Expectations - Takes initiative and demonstrates confidence in decision-making and task completion. Actively seeks out opportunities for improvement, contributing to the success of projects and initiatives.

5 - Role Model - Demonstrates a high level of confidence, decisiveness, and leadership in addressing tasks and challenges. Proactively engages in collaborative problem solving to implement solutions and drives high quality results. Serves as a role model for others, inspiring and motivating colleagues to take action and achieve excellence.

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Self-Development

Actively works towards continuous growth through the participation in professional development activities and applies new learning within job related tasks and projects.

1 - Does Not Meet Expectations - Does not take initiative in seeking opportunities for professional growth. Is resistant to engage in opportunities for skill building and performance improvement. Does not apply new learning to job related tasks and projects.

2 - Somewhat Meets Expectations - Inconsistently engages in opportunities for professional growth. Will participate in training when required. Inconsistently applies new learning within job related tasks and projects.

3 - Meets Expectations - Actively works towards continuous growth through the participation in professional development activities and applies new learning within job related tasks and projects.

4 - Exceeds Expectations - Seeks out professional development opportunities to continue to grow professionally. Regularly applies and shares new learning to enhance job performance and improve overall team success.

5 - Role Model -   Proactively engages in professional development. Serves as a role model for self-directed learning by applying new skills, sharing knowledge and expertise gained through professional development. Mentors and inspires others through their dedication to professional growth and continuous improvement.

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Core Competencies Rating Descriptors

People Leaders

Below are the competencies established for those identified as People Leaders. People Leadersare defined as any person with direct reports and is in a Senior Director and below title.

Decision Quality

Makes good decisions based upon a mixture of analysis, wisdom, experience, and judgment; most of his/her solutions and suggestions turn out to be correct and accurate when judged overtime; sought out by others for advice and solutions.

1 - Does Not Meet Expectations - Did not make timely decisions or made decisions that negativelyimpact people or processes. Did not use good judgment in decision making or did not make decisionsthat positively impact the business.

2 - Somewhat Meets Expectations - Made timely decisions only when provided with the full pictureand details. Sometimes made good decisions and/or uses good judgment in decision making.

3 - Meets Expectations - Made decisions in a timely manner with full or limited details. Always used good judgment and provided effective solutions to problems. Took accountability for actions related todecisions.

4 - Exceeds Expectations - Made well-informed, effective and timely decisions, even when data waslimited or solutions produced unpleasant consequences; perceived the impact and implications of decisions. Strived for results; maintained endurance, demonstrated flexibility and resilience.

5 - Role Model - Could analyze data and other external factors to make decisions that impact broaderareas of the university. Dealt effectively with pressure; remained optimistic and persistent, even underadversity. Recovered quickly from setbacks.

Managerial Courage

Provides current, direct, complete, and "actionable" positive and corrective feedback to others;lets people know where they stand; faces up to people problems on any person or situation (notincluding direct reports) quickly and directly; was not afraid to take negative action when necessary.

1 - Does Not Meet Expectations - Showed difficulty communicating and navigating through difficultsituations involving direct reports and peers. Allowed issues to fester or escalate before acting.

2 - Somewhat Meets Expectations - Achieved results by using "leadership" as a motivator to get direct reports to act rather than taking responsibility for unpopular decisions. Sometimes provided onthe spot feedback, but often reserved feedback for formal performance counseling.

3 - Meets Expectations - Was direct, but fair and made on the spot corrections by providing instantfeedback and creating a reciprocal environment. Was sometimes proactive in managing difficult situations involving direct reports; provided and accepted constructive feedback.

4 - Exceeds Expectations - Held others accountable and created an environment where constructive feedback was provided and accepted to and from direct reports, peers, and leaders alike. Was a positiveinfluencer and could be direct; challenged the status quo and managed difficult situations swiftly and proactively.

5 - Role Model - Was a positive influence and was often seen as the leader amongst peers. Was alwaysproactive in creating solutions for employee challenges before issues arise. Encouraged creative tensionand differences of opinions; held firm to what was right, regardless of popular opinion; held self and others at varying levels accountable. Sought feedback from all levels and quickly turned it into actionable items.

Developing Direct Reports

Provides challenging and stretching tasks and assignments; holds frequent development discussions; is aware of each direct report's career goals; constructs compelling development plans and executes them; pushes direct reports to accept developmental moves; will take directreports who need work; is a people builder.

1 - Does Not Meet Expectations - Had shown difficulty in developing and motivating some or alldirect reports. Allowed employees to be complacent and discouraged risk-taking.

2 - Somewhat Meets Expectations - Could motivate most direct reports to take risks and couldinfluence them to create and achieve goals.

3 - Meets Expectations - Had developed the ability of others to perform and contribute to theorganization by providing ongoing feedback opportunities to learn through formal and informal methods.

4 - Exceeds Expectations - Was an active listener, built rapport and was able to persuade and influence direct reports to step outside of their comfort zones and explore new areas and opportunitiesto enhance knowledge and skillsets. Created long-term development plans and stretch goals for employee success. Was a trusted coach and mentor for non-direct reports.

5 - Role Model - Felt successful when employees were successful; built into others and pushed them toexceed all goals. Was a risk taker and put needs of employees above his/her own. Felt comfortable delegating authority when needed and took every opportunity to showcase talents of his/her direct reports. Was well-known as a trusted mentor to others outside of department.

Dealing with Ambiguity

Can effectively cope with change; can shift gears comfortably; can decide and act without having the total picture; isn't upset when things are up in the air; doesn't have to finish thingsbefore moving on; can comfortably handle.

1 - Does Not Meet Expectations - Was resistant to change; rarely sought opportunities to provide a different perspective; had difficulty making decisions or executing without the full picture. Had difficultyleading direct reports through change.

2 - Somewhat Meets Expectations - Maneuvered through changing situations and ambiguity with guidance. Communicated change but showed hesitation in times of ambiguity. Often required additionalinformation and guidance to move forward.

3 - Meets Expectations - Was comfortable with change adapted to changing situations. Effectivelycommunicated changes to direct reports and showed clear paths to change, even in ambiguous situations. Was able to achieve results with some guidance and direction.

4 - Exceeds Expectations - Was comfortable with change and exhibited adaptablity in both changing and ambiguous environments. Communicated and moved direct reports through change with little to noguidance.

5 - Role Model - Embraced change and influenced others in the change process; was an effectivechange agent in the organization. Flawlessly executed and managed others in an ambiguous environment. Had achieved adoption of change within his/her team.

Business Acumen

Knows how businesses work; knowledgeable in current and possible future policies, practices, trends, and information affecting his/her business and organization; knows the competition; is aware of how strategies and tactics work in the workplace.

1 - Does Not Meet Expectations - Had shown difficulty in understanding current business processes,both internal to and external to his/her own functioning area.

2 - Somewhat Meets Expectations - Understood the functions within specific areas of his/her ownfunctioning area but had a limited understanding of areas outside of his/her own.

3 - Meets Expectations - Understood the inter-workings of functions within his/her own area ordepartment. Identified broken processes and made suggestions on course correction.

4 - Exceeds Expectations - Positioned the department or area for future success by identifying newopportunities; built the department by developing or improving products or services. Took calculatedrisks to accomplish organizational objectives.

5 - Role Model - Shared a deep and applicable understanding of the inter-workings of multiple departments and how departments achieve its goals and objectives. Gained knowledge through externalbenchmarking and collaborate with external groups to create and maintain best practices

Strategic Agility

Sees ahead clearly; can anticipate future consequences and trends accurately; has broad knowledge and perspective; is future oriented; can articulately paint credible pictures and visions of possibilities and likelihoods; can create competitive and breakthrough strategies andplans.

1 - Does Not Meet Expectations - Focused on current state and was not able to visualize future state.Exhibited difficulty in understanding needs for change and had not demonstrated the ability to strategize for future state.

2 - Somewhat Meets Expectations - Could see the future state, but had a hard time maneuvering through present state. Could only visualize future state that was clear and not ambiguous.

3 - Meets Expectations - Developed and executed a competitive analysis and lead the changes that create differentiation and growth. Visualized future state through clear and current strategies and plans.

4 - Exceeds Expectations - Executed strategies through people by providing leadership, feedback, coaching, utilizing influence, managing conflict and developing talent for long-term success. Conceptualized future state through current strategies and plans, whether clear or ambiguous. **–**

5 - Role Model - Exhibited the ability to think strategically and created a vision and strategy for futurestate. Had been able to provide and lead employees into that future state and share a big picture visionacross departments.

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Core Competencies Rating Descriptors

Executives

Below are the competencies established for those identified as Executives. Executives are defined as individuals with titles of Executive Director, Assistant Dean, AVP, Vice Provost and above.

Directing Others

Is good at establishing clear directions; sets stretching objectives; distributes the workload appropriately; lays out work in a well-planned and organized manner; maintains two-way dialogue with others on work and results; brings out the best in people; is a clear communicator.

1 - **Does Not Meet Expectations** - Sometimes presented ambiguous goals or unclear direction. Saved high-profiled tasks for self. Often times delegated responsibility, not authority, or delegated more authority than he/she should give. May have been overly directive and stifled creativity and initiative.

2 - **Somewhat Meets Expectations** - Set goals and objectives that were too easily achieved or easily achievable. Delegated work without guidance. Pushed people too hard or was not able to see people's limits.

3 - **Meets Expectations** - Developed the ability of others to perform and contribute to the organization by providing ongoing feedback and opportunities to learn through formal and informal methods. Set and met stretch goals within department.

4 - **Exceeds Expectations** - Inspired others; manages and leads effectively. Exuded executive presence; establish trust and respect; displayed fairness and objectivity; navigated politics; displayed empathy; listened actively; held people accountable. Led all teams within department to create and exceeded stretch goals.

5 - Role Model - Adaptive capacity or the ability to change and be flexible. Possessed managerial wisdom, perceived variation in the environment. Mastered flexibility, resiliency, drove innovation and led courageously. Recognized and seized growth opportunities. Expanded scope and aligned with others' stretch goals outside of assigned areas. Led all teams to collaborate externally and exceeded stretch goals.

Interpersonal Savvy

Relates well to all kinds of people, up, down and sideways, inside and outside the organization; builds appropriate rapport; builds constructive and effective relationships; uses diplomacy and tact; can diffuse even high-tension situations comfortably.

1 - **Does Not Meet Expectations** - Had shown difficulty in understanding and exhibiting emotional intelligence and building rapport within own department and across the university. Expressed points ofview in a blunt or insensitive manner.

2 - **Somewhat Meets Expectations** - Built few relationships; engaged with people in immediate workarea only. Was uncomfortable when interacting with people different from self. May have been seen aslacking authenticity.

3 - **Meets Expectations** - Related comfortably with others across levels and functions. Was diplomatic and tactful; built rapport in an open and accepting way. Picked up on interpersonal and group dynamics.

4 - **Exceeds Expectations** - Built constructive relationships with people both similar and contrasting toself. Exercised both diplomacy and genuine empathy in all situations. Was adaptable and flexible and able to maneuver through situations effectively.

5 - **Role Model** - Proactively developed relationships with a wide variety of people. Built immediate rapport even when faced with difficult or tense situations. Understood interpersonal and group dynamics and reacted in an effective manner. Engaged input from others and listened with empathy and concern.

Perspective

Looks toward the broadest possible view of an issue/challenge; has broad-ranging personal and business interests and pursuits; can easily pose future scenarios; can think globally; can discuss multiple aspects and impacts of issues and project them into the future.

1 - **Does Not Meet Expectations** - Did not consider multiple and varied viewpoints when addressingproblems and opportunities. Did not understand big picture or have a big picture focus.

2 - **Somewhat Meets Expectations** - Had a short-term vision or maintained a departmental perspective; may have overemphasize local needs (departmental) without seeing the impact on theorganization.

3 - **Meets Expectations** - Visualized the current landscape and presented future scenarios. Had anabsorptive capacity or the ability to acquire, recognize and apply new information.

4 - **Exceeds Expectations** - Exhibited a positive and optimistic perspective; was committed to communicating and promoting organizational values across the organization. Exhibited exceptionalpresentation skills.

5 - **Role Model** - Exhibited the ability to think globally and provide a big picture outlook and perspective on areas both within the system and the external environment. Exhibited the drive toinitiate, anticipate and lead change. Promoted and drove institutional learning and envisioned continuous organizational future success.

Business Acumen

Knows how businesses work; knowledgeable in current and possible future policies, practices, trends and information affecting his/her business and organization; knows the competition; is aware of how strategies and tactics work in the workplace.

1 - **Does Not Meet Expectations** - Had shown difficulty in understanding current business processes,both internal to and external to his/her own functioning area. Was unclear about the cause-and-effect relationships among different business functions and overall financial performance.

2 - Somewhat Meets Expectations - Understood the functions within specific areas of his/her ownfunctioning area, but had a limited understanding of areas outside of his/her own. Had a working knowledge of financial analysis and performance.

3 - Meets Expectations - Understood the inter-workings of functions within his/her own area or department. Identified broken processes and make suggestions on course correction. Used financialanalysis to generate, evaluate, and act on strategic options and opportunities.

4 - Exceeds Expectations - Positioned the organization for future success by identifying new opportunities; built the organization by developing or improving products or services. Took calculated risks to accomplish organizational objectives. Identified and monitored key financial indicators to gaugeperformance, identify trends, and suggest strategies that can impact results.

5 - Role Model - Understood the inter-workings of multiple departments and was able to share a big picture vision across the university. Was able to develop and execute a competitive analysis and lead thechanges that create differentiation and growth. Transformed financial information into business intelligence through analysis and quantitative and qualitative analysis.

Organizational Agility

Knowledgeable about how organizations work; knows how to get things done both through formal channels and the informal network; understands the origin and reasoning behind key policies, practices, and procedures; understands the cultures of organizations.

1 - Does Not Meet Expectations - Focused on current state and was not able to visualize futurestate. Had shown difficulty in understanding needs for change and had not shown the ability to strategize for future state.

2 - Somewhat Meets Expectations - Could see the future state, but had a hard time maneuveringthrough present state. Visualized a future state that was clear and not ambiguous.

3 - Meets Expectations - Formulated objectives and priorities and implemented plans consistent withthe long-term interest of the organization in a global environment. Capitalized on opportunities and managed risks.

4 - Exceeds Expectations - Developed and applied strategy; maintained strategic business performance. Took a long-term view and built a shared vision with others; acted as a catalyst fororganization change. Influenced others to translate vision into action.

5 - Role Model - Built and managed workforce based on organizational goals, budget considerations and staffing needs. Ensured employees were appropriately recruited, selected, appraised and rewarded;took action to address performance problems. Managed a multi-sector workforce and a variety of work situations.