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| **Employee Name:** | **Job Title:** | **Department:** |  |
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| **EMPLID / CampusID:** | **Performance Review Period**  **January 1, 2019 - December 31, 2019** | **Self-Evaluation with Budgetary Responsibilities** |  |

Please complete the following information to help you prepare for your annual performance review. Use the spaces provided to include appropriate comments about your job and your performance. Please focus your responses based on your experiences during the prior year. You may use additional pages as necessary. Consult with your supervisor regarding when the self-evaluation should be submitted prior to the formal annual review meeting.

**Job Knowledge**

Provide examples of ways in which

* used your knowledge effectively and appropriately
* developed solid functional knowledge and proficiency within your assigned department or work unit.
* demonstrated and applied your knowledge and expertise in undertaking assignments and duties, while applying appropriate functional processes and procedures, and while using specialized skills and equipment (where appropriate).

**Productivity**

Provide examples of ways in which

* efficiently analyzes issues, make decisions, and overcome problems.
* demonstrated originality and inventiveness to yield optimal outputs
* generated a range of solutions and courses of action.
* thought ‘outside the box’ to find options or used the good ideas of others to help develop solutions or sought advice from those who’ve solved similar problems.

**Accuracy & Quality**

Provide examples of ways in which you

* completed your work or tasks in a timely manner, accurately and thoroughly.
* produced the best possible results, and you integrated alternatives and options as needed.
* followed through on projects, assignments, and commitments and met deliverables and timelines.
* worked within and across functional teams in a professionally collaborative and productive manner to complete work processes, projects, and obtained solid results.

**Customer Service**

Provide examples of ways in which you

* met the needs of internal and external customers by delivering high quality products and services on time
* maintained a positive attitude, and worked cooperatively and collaboratively in all situations, within and across teams and functions, exhibiting a high level of integrity, honesty, and confidence in all professional interactions.
* consistently present a positive disposition when interacting with customers.
* provided customers status reports and progress updates. Sought customer feedback and ensures needs have been fully met.
* sought ways to improve service delivery. Emphasizes a team approach to providing great customer service.

**Supervision Required/Initiative**

Provide examples of ways in which you

* took charge of assigned work, and followed through to completion.
* demonstrated a willingness to initiate additional actions independently, without requiring specific direction or guidance.
* proactively or consistently looked for new or different opportunities to add value and minimize or reduce costs in a productive manner.
* proactively in sought and managed your individual training opportunities to achieve professional developmental goals.

**Adaptability**

Provide examples of ways in which you

* mastered new techniques or duties and demonstrated flexibility in meeting the changing demands of the work environment.
* demonstrated an overall positive and flexible demeanor, and you accepted deviations from “normal” duties and responsibilities in a collegial, team-oriented manner.
* took work priorities and work deadlines into account in your requests for time off.

**Organization**

Provide examples of ways in which you

* effectively and efficiently planned, arranged, and completed work priorities and made efficient use of available resources to optimize productivity.
* identified potential challenges and opportunities, and adjusts plans based on input.
* evaluated progress against schedule and goal objective.
* anticipated and prepared for upcoming events, ensured adequate resources were available.

**Communication**

Provide examples of ways in which you

* expressed ideas effectively, concisely and clearly through verbal and written communication.
* listened attentively to people’s ideas and concerns.
* found non-threatening ways to approach others on sensitive issues.
* anticipated how others will react to a situation.

**Interpersonal Relations/Teamwork**

Provide examples of ways in which you:

* established and maintained effective and collaborative professional relationships at all levels and across functional teams.
* established and maintained effective and productive interactions and working relationships with members of management, your peers, as well as internal and external customers.
* consistently treat others with honesty, respect, courtesy, tact and cooperation?

**ADDITIONAL REVIEW FOR BUDGET MANAGERS**

**Budget**

Provide examples of ways in which

* demonstrated understanding and utilization of appropriate financial and budget controls.
* safeguards fiscal resources, and adheres to all internal control procedures designed to prevent and detect theft or misuse of funds. Remains alert to security breaches and reports problems. Seeks ways to improve internal controls.
* kept current on fiscal procedures, principles, standards, rates, etc.
* ensured all financial data is properly calculated and reported.
* responsibly allocated and accounts for the use of fiscal resources, weighing alternatives and their benefits.

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| **Development Action Plan – Goal 1** | | | | |
| **Development Goal 1**  *What do you want to work on and to what end?* | | **I will improve my communication skills in Supplier Diversity so that maximum opportunities are offered to Small, Minority and Woman-Owned Businesses. I will know that I have been successful when Procurements awards at least two contracts annually with Small, MWBEs.** | | |
|  | **Development Actions** *Be sure to consider where you can connect your development actions to your business objectives.* | | **Target Dates** *When will you start and stop each action?* | **Support Needed/Barriers  To Overcome** *What help will you need and from whom? What barriers will you likely face?* |
|  | **Assisting Source Managers in sourcing and selecting Small, MWBEs on upcoming bid opportunities and to support them in non-contractual requirements.** | | **09-01-2018 to 08-31-2019** | **\*Lack of communication from Sourcing Managers on upcoming bidding opportunities and non-contact requirements. \*Insufficient utilization of the System for Awards Management (SAM) by Sourcing Managers and Buyers as an effort to source Small, MWBEs. \*Unplanned meetings with urgent deadlines. (Federal Projects).** |
|  | **Utilize available tools to identify federal approved Small, MWBEs, i.e. \*The System for Awards Management (SAM), supporting outreach activities, reaching out to Diversity and Inclusion Organizations,** | | **09-01-2018 to 08-31-2019** | **Scarcity of support from Senior Management on acquiring proper tools and funds to support State U’s Supplier and Diversity Inclusion Program.** |
|  | **Scheduling selected group meetings to discuss providing “Maximum Opportunities” to Small, MWBEs.** | | **09-01-2018 to 08-31-2019** | **Minimum interest from key players due to established contracts with large suppliers and the easy of selecting a punch-out supplier verse a non-contract Small, MWBE supplier.** |

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| **Development Action Plan – Goal 2** | | | | |
| **Development Goal 2**  *What do you want to work on and to what end?* | |  | | |
|  | **Development Actions** *Be sure to consider where you can connect your development actions to your business objectives.* | | **Target Dates** *When will you start and stop each action?* | **Support Needed/Barriers  To Overcome** *What help will you need and from whom? What barriers will you likely face?* |
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| **Development Action Plan – Goal 3** | | | | |
| **Development Goal 3**  *What do you want to work on and to what end?* | |  | | |
|  | **Development Actions** *Be sure to consider where you can connect your development actions to your business objectives.* | | **Target Dates** *When will you start and stop each action?* | **Support Needed/Barriers  To Overcome** *What help will you need and from whom? What barriers will you likely face?* |
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