

ANNUAL PERFORMANCE EVALUATION CYCLE		<i>(Dates From/To):</i>			to	
Dept. Name:		Employee Name:				
Supervisor Name:		Employee ID:				
Supervisor Title:		Employee Title:				

UNIVERSITY OF NORTH CAROLINA STRATEGIC PLAN

NC State is committed to supporting the University of North Carolina’s system-wide strategic initiatives, as outlined below:

- **Access:** The UNC system must continue its proud heritage of access and student diversity.
- **Affordability & Efficiency:** Ensure a UNC education is within the financial means of all in the state.
- **Student Success:** Increase degree attainment and ensure value and relevance for students.
- **Economic Impact & Community Engagement:** Deepening partnerships that strengthen local communities and the state’s economy.
- **Excellent & Diverse Institutions:** Help institutions achieve excellence within individual missions.

For more information about the UNC Strategic Plan, please visit <https://www.northcarolina.edu/strategic-planning>.

NC STATE UNIVERSITY STRATEGIC PLAN: THE PATHWAY TO THE FUTURE

NC State University’s strategic plan sets five bold goals: boosting student success, funding faculty and infrastructure, spurring interdisciplinary work, imbuing a commitment to excellence and pursuing local and global partnerships. For more information about the NC State Strategic Plan, please visit: <https://strategicplan.ncsu.edu/about/>.

INSTITUTIONAL GOALS

Review the institutional goals with the employee and discuss them in relationship to the duties on the employee’s position description. Provide additional clarification of specific expectations, as needed.

EXPERTISE

- a. **Precision:** Produces work that is accurate, thorough, and demonstrates sufficient analysis and decision-making to meet the requirements of the employee’s position and profession.
- b. **Resourcing:** Makes efficient and appropriate use of materials and documents work appropriately.
- c. **Innovation:** Looks for ways to improve efficiency or quality.
- d. **Development:** Maintains technical skills and relevant professional credentials.

ACCOUNTABILITY

- a. **Productivity:** Completes required volume of work by established deadlines and stays productive throughout workday.
- b. **Autonomy:** Generally completes work with few reminders and/or infrequent oversight.
- c. **Prioritizing:** Takes sufficient/appropriate measures to plan and organize work, prioritize tasks, and set realistic goals.
- d. **Coordination:** Seeks needed information to complete work and timely communicates status with relevant parties.

CUSTOMER-ORIENTED

- a. **Clarity:** Listens to determine the most effective way to address customer needs and concerns.
- b. **Awareness:** Shows a solid understanding of customer needs, seeks out customer input to better understand needs, and develops ideas to meet those needs.
- c. **Attentiveness:** Follows through on commitments, despite time pressures or obstacles, and maintains relevant communication with customers until job is completed.
- d. **Diplomacy:** Maintains a professional and respectful tone and exhibits diplomacy when dealing with frustrated individuals or during sensitive or confrontational situations.

TEAM-ORIENTED

- a. **Collegiality:** Communicates and engages directly, clearly, and tactfully with colleagues.
- b. **Collaboration:** Provides feedback and healthy dialogue on performance and operational issues, as requested, willingly adapts to change, and adheres to decided actions.
- c. **Contribution:** Makes decisions with others in mind, and willingly performs additional duties when team members are absent, during times of increased workload, or as otherwise required by management to meet business needs.
- d. **Attendance:** Absences are infrequent and do not place an undue burden on supervisor or colleagues.

COMPLIANCE & INTEGRITY

- a. **Policy:** Complies with personnel and equal opportunity policies, including prohibitions on harassment, discrimination, and workplace violence, and all other policies, including appropriate use of university resources.
- b. **Safety:** Complies with all safety requirements for the position, including successful completion of training and proper use of personal protective equipment.
- c. **Ethics:** Chooses ethical actions, even under pressure, avoids situations considered inappropriate or that present a conflict of interest, holds self and others accountable for ethical decisions.
- d. **Respect:** Appreciates individual and cultural differences and treats all people with dignity and respect.

SUPERVISION *(for supervisors only)*

- a. **Oversight:** Provides adequate stewardship of assigned resources, including budget, space, equipment, and staffing.
- b. **Goal-Setting:** Provides clear objectives that foster work unit development and align with University values and goals.
- c. **Managing Talent:** Provides candid, timely, and constructive feedback on performance and behavior, hires individuals with the qualities and skillsets for success, and contributes to meeting University’s EO and affirmative action goals.
- d. **Leading:** Serves as role model and engenders trust, commitment, and civility.

GOALS AND OBJECTIVES

At the beginning of the performance cycle, the supervisor sets at least three (3) goals and objectives for the year based on key business needs and strategic initiatives.

GOAL:	
Description:	

GOAL:	
Description:	

GOAL:	
Description:	

GOAL:	
Description:	

GOAL:	
Description:	

PROFESSIONAL DEVELOPMENT PLANS

At the beginning of the performance cycle, the supervisor should discuss training and professional development opportunities with the employee and list any planned activities below. Supervisors should include resources that will be provided to the employee and indicate deadlines as needed. Progress under the talent development plan should be discussed periodically with the employee.

DIVERSITY, EQUITY AND INCLUSION LEARNING PLAN

Per Chancellor Woodson's June 4, 2020 message entitled, "Diversity and Inclusion: Recognizing our Shortcomings, Working to Improve", NC State requires all employees to complete at least one diversity, equity and inclusion (DEI) course per year. In addition, the University recommends that each employee have at least one additional individual DEI learning and development goal each performance cycle. The supervisor determines with the employee the appropriate learning and development goal(s) for the cycle. The supervisor is expected to ensure the mandatory one (1) DEI class requirement is met, and can also work with the employee to set additional learning and development goals. The DEI learning plan is not individually rated, but does demonstrate to employee performance under the Institutional Goal of "Respect: Appreciates individual and cultural differences and treats all people with dignity and respect." Progress under the DEI development plan should be discussed periodically with the employee. Please refer to the [OIED website](#), or [LinkedIn Learning](#) for information and resources.

ANNUAL PERFORMANCE EVALUATION

At the end of the performance cycle, the supervisor conducts an annual review with the employee in order to assess the employee's performance on established goals and objectives, as well as other expectations communicated during the cycle.

Date of Review:	
Supervisor Comments:	

Employee Comments:	
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OVERALL RATING

As part of the annual evaluation, supervisors select the rating that best describes the employee’s overall performance during the entire performance cycle, as defined below.

- **Exceeding Expectations:** Routinely performs above expected performance of assigned duties and is generally considered among the highest performing employees within the work unit.
- **Meeting Expectations:** Generally performs at, and on occasions may exceed, a successful level of performance of assigned duties.
- **Not Meeting Expectations:** Often performs below an acceptable level of performance of assigned duties or has demonstrated substantial performance deficiencies in certain assigned duties.

EXCEEDING EXPECTATIONS		MEETING EXPECTATIONS		NOT MEETING EXPECTATIONS	
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SIGNATURES FOR ANNUAL PERFORMANCE EVALUATION

Supervisor:		Date:	
Employee:		Date:	