



EMPLOYEE NAME (Last, First, MI)		JOB TITLE	EMPLOYING UNIT (Division and/or Work Unit)	REVIEW COMPLETED BY
EMPLOYEE ID		REPORT PERIOD (MONTH/YEAR) FROM TO	POSITION DESCRIPTION <input type="checkbox"/> Is Up To Date <input type="checkbox"/> Needs Revision	TYPE OF POSITION (click all that apply): <input type="checkbox"/> Academic <input type="checkbox"/> University <input type="checkbox"/> Limited Appointment <input type="checkbox"/> Student Hourly <input type="checkbox"/> Temporary (LTE) <input type="checkbox"/> Supervisory <input type="checkbox"/> Non-Supervisory

SECTION 1 – PERFORMANCE EXPECTATIONS FOR ALL STAFF	NI	ME	EE	EX
Work Performance <ul style="list-style-type: none"> • Knowledgeable in performing job duties. • Applies knowledge and available resources effectively and efficiently. • Performs work assignments accurately and according to professional standards. 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication & Working Relations <ul style="list-style-type: none"> • Maintains effective working relationship with coworkers, supervisors and/or customers. • Asks for direction or clarification when needed. • Displays effective listening skills. • Assist co-workers when appropriate. • Demonstrates effective verbal & written communication skills. 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dependability <ul style="list-style-type: none"> • Demonstrates punctuality and follows procedure for absences. • Consistently performs well while working independently. • Takes initiative to use time productively. 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer Service <ul style="list-style-type: none"> • Relates work and job purpose and commitment to customers. • Treats all internal and external customers with respect. • Manages challenging customer service situations calmly and tactfully. 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Safety <ul style="list-style-type: none"> • Follows established procedures and protocols for job function at all times. • Takes appropriate action if unsafe conditions or safety hazards arise. • Other: <i>(Examples of Other should be noted in comments box)</i> 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accountability <ul style="list-style-type: none"> • Demonstrates honesty and ethical behavior. • Is willing to adjust to shifting priorities and changes in work assignments. • Accepts responsibility for own work. • Follows through on commitments. 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



<p>Special Projects</p> <ul style="list-style-type: none"> Identify work on special projects, committees or shared governance, if applicable. 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p><u>OVERALL COMMENTS (required):</u></p>				

SECTION 2 – EID COMPETENCIES (Required for managers/supervisors, optional for others)	NI	ME	EE	EX
	<p>Engagement</p> <ul style="list-style-type: none"> Provides strong and effective leadership to ensure that work unit is high performing and achieves its mission. Creates a positive climate by setting clear strategy goals and expectations. Honors FP&M and Department core values. Provides regular feedback and support. Rewards performance. Supports and assists employees in learning and development. <p>Inclusion</p> <ul style="list-style-type: none"> Fosters a welcoming and inclusive work environment. <p>Diversity</p> <ul style="list-style-type: none"> Creates and supports recruitment, selection and onboarding processes that contribute to workforce diversity. 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p><u>OVERALL COMMENTS (required):</u></p>				



SECTION 3 – SUPERVISOR EXPECTATIONS (Required for supervisors/managers)	NI	ME	EE	EX
<p>Acts as a Leader:</p> <ul style="list-style-type: none"> • Demonstrates the FP&M's Core Values, Mission and Vision <ul style="list-style-type: none"> ○ By engaging & inspiring your team. ○ By encouraging employee development. ○ By ensuring each individual within department knows what is expected of them at work. • Demonstrates the ability to reach firm and clearly defined decisions in a timely manner. • Coaching your employees for success. • Drives accountability throughout Department and FP&M. 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p>Planning and Continuous Improvement:</p> <ul style="list-style-type: none"> • Demonstrates ability to plan and prepare administrative unit programs, activities and services. • Develops and applies performance metrics to track and improve services. Communicates Metric results to FP&M Leadership Team, Department and others as needed. 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p>Fiscal Management:</p> <ul style="list-style-type: none"> • Demonstrates efficient & effective utilization of resources. • Safeguards UW-Madison assets. • Implements effective internal controls, and software/data security. 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p>Professional Expertise:</p> <ul style="list-style-type: none"> • Demonstrates effective job knowledge. • Stays current with trends and/or research in field. • Maintains necessary professional credentials as applicable. 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p><u>OVERALL COMMENTS (required):</u></p> 				



SECTION 4 – PERFORMANCE EXPECTATIONS SPECIFIC TO POSITION

Using position description, identify a minimum of four (4) key performance expectations:	NI	ME	EE	EX	Comments:
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

SECTION 5 – GOALS SPECIFIC TO POSITION

Identify a minimum of four (4) goals:	Update/results:

SECTION 6 – GOALS SPECIFIC TO INDIVIDUAL - TRAINING, DEVELOPMENTAL, CAREER GROWTH

Identify a minimum of two (2) goals:	Update/results: