



# Full Cycle Performance EHRA Institutional Goals Worksheet

The University of North Carolina Wilmington establishes these institutional goals for all EHRA non-faculty employees. These descriptions are written at the “meeting expectations” level of performance

## Instructions

Use the following worksheet to brainstorm and document how the institutional goals will apply to your department, team, or individual employee. This worksheet is NOT a required part of the Full Cycle Performance Program; however, it may help you as you prepare to discuss the institutional goals and associated expectations with your employees. [CLICK HERE](#) to see suggested expanded versions of the institutional goals.

Remember, it will be important not only to make clear what “meeting expectations” in each goal looks like, but to also give some ideas about what “exceeding expectations” looks like. Here is an example:

Goal: TECHNICAL/SUBJECT MATTER EXPERTISE			
	Not Meeting Expectations	Meeting Expectations	Exceeding Expectations
<b>Development</b>	<i>Employee:</i> - shows little initiative to maintain technical skills or relevant professional credentials and does not develop/maintain connections with professionals in their field. - takes advantage of learning and growth opportunities only when required - often focuses on assigning blame when things go wrong rather than working toward growth and development	<i>Employee:</i> - maintains technical skills and relevant professional credentials - maintains connections with professionals in their field - seeks ways to address development needs instead of assigning blame when things go wrong	<i>Employee:</i> - continually enhances technical skills and professional credentials, including going above the basic requirements - is recognized as expert in their field and participates in a professional association to ensure visibility in their field - seeks out and engages in continuous learning and growth opportunities - provides coaching to others to leverage their strengths and develop areas of needed improvement

Having trouble brainstorming what “exceeds expectations” might look like in a certain role? Here are a couple factors to keep in mind:

- Reactive vs. Proactive**  
 Is the employee doing the job when required (meeting expectations), or is the employee anticipating potential setbacks, projects, or actions in advance to be ready when the time comes (exceeding expectations)
- Frequency & Consistency**  
 How consistent is the employee in completing the job roles? How frequently does the employee go above and beyond the basic requirements?
- Attitude & Sharing**  
 Does the employee maintain a positive or encouraging attitude when completing the work (exceeding expectations)? Is the employee a champion of the institutional goals and a model for others in the department (exceeding expectations)?

*Need assistance navigating the other parts of the Full Cycle Performance Program or Appraisal Tool?*

Check out our other resources on the [Full Cycle Performance web page!](#)



ANNUAL PERFORMANCE APPRAISAL CYCLE (Dates From/To):			to	
Dept. Name:		Employee Name:		
Dept. #:		Employee ID:	Position #:	
Supervisor Name:		Supervisor Title:		

**COMMUNICATION**

- a. **Clarity:** Communicates in a manner that clearly and accurately conveys information, is professional and respectful in tone, is suitable for the target audience, and is concise but sufficient in terms of required detail.
- b. **Awareness:** Considers audience in verbal and/or written expression in communicating with colleagues, clients, supervisory management, and other individuals in the work setting.
- c. **Attentiveness:** Listens to determine the most effective way to address customer/colleague needs and concerns. Follows through on commitments, despite time pressures or obstacles, and timely responds to requests.
- d. **Diplomacy:** Maintains a professional and respectful tone and exhibits diplomacy when dealing with frustrated individuals or during sensitive or confrontational situations.

<b>Meets Expectations (Expanded):</b>	
<b>Exceeds Expectations:</b>	
<b>Does Not Meet Expectations:</b>	







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**INNOVATION & CREATIVITY**

- a. **Creativity:** Implements creative ideas to move the organization, processes, and systems forward.
- b. **Innovation:** Introduces new concepts, models, practices, and services that function to enhance operations of the unit, department, or division.
- c. **Resourcing:** Makes efficient, appropriate, and creative use of materials.

**Meets Expectations (Expanded):**

**Exceeds Expectations:**

**Does Not Meet Expectations:**



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<b>Supervisor Name:</b>		<b>Supervisor Title:</b>		

## TECHNICAL/SUBJECT MATTER EXPERTISE

- a. **Expertise:** Demonstrates the relevant technical or task-specific expertise necessary to perform assigned duties, which may include knowledge of relevant research methods, technology, procedures, policies or other methods, standards or techniques that are specific to the employee’s position and profession.
- b. **Autonomy:** Demonstrates relevant technical or subject-matter knowledge at a level sufficient to perform the duties of the position in an accurate & professional manner without requiring an unusual degree of oversight or correction.
- c. **Development:** Maintains technical skills and relevant professional credentials.
- d. **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>Meets Expectations (Expanded):</b>          
<b>Exceeds Expectations:</b>          
<b>Does Not Meet Expectations:</b>          





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**CONTINUOUS IMPROVEMENT & QUALITY SERVICE ORIENTATION**

- a. **Service Orientation:** Takes steps to improve customer service by developing and/or implementing measurable and sustainable initiatives to culture that is effective, responsive, and respectful.
- b. **Compliance:** Demonstrates the significance and importance of the overall values and mission of the university, including diversity and inclusion, compliance, ethics, and internal controls.
- c. **Safety:** Complies with all safety requirements for the position, including successful completion of training and proper use of personal protective equipment.

<b>Meets Expectations (Expanded):</b>          
<b>Exceeds Expectations:</b>          
<b>Does Not Meet Expectations:</b>          





ANNUAL PERFORMANCE APPRAISAL CYCLE (Dates From/To):			to	
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**LEADERSHIP & RESULTS ORIENTATION** *(for supervisors)*

- d. **Oversight:** Provides adequate stewardship of assigned resources, including budget, space, equipment, and staffing to consistently deliver results.
- e. **Goal-Setting:** Provides clear objectives, goals, and priorities that foster work unit development, align with university values and strategic goals.
- f. **Manage Talent:** Provides candid, timely, and constructive feedback on performance and behavior and hires individuals with the qualities and skillsets to be successful.
- g. **Decision-Making:** Makes clear, effective decisions and produces results through strategic planning and development, and implementation and evaluation of programs and policies.
- h. **Leading:** Ensures commitment for the vision, mission and core values of the university and the unit, department or division. Serves as role model. Engenders trust, commitment, and civility.

<p><b>Meets Expectations (Expanded):</b></p>
<p><b>Exceeds Expectations:</b></p>
<p><b>Does Not Meet Expectations:</b></p>





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## DIVERSITY & INCLUSION *(for supervisors)*

- i. **Diversity:** Models inclusive excellence through specific actions that support the university’s diversity and globalization goals in the recruitment, hiring, and retention of talented and diverse faculty and staff.
- j. **Ethics:** Chooses ethical action, even under pressure, avoids situations that are inappropriate or present a conflict of interest, holds self and others accountable for ethical decisions, and addresses unethical actions directly.
- k. **Respect:** Respects individual and cultural differences, treats all people with dignity and respect. Fosters an environment in which people who are diverse can work together cooperatively and effectively in achieving organizational goals.

### Meets Expectations (Expanded):

### Exceeds Expectations:

### Does Not Meet Expectations: