

ANNUAL PERFORMANCE EVALUATION CYCLE		(Dates From/To):	July 1, 20??	to	June 30, 20??
Dept. Name:	Human Resources	Employee Name:	Bronco Bob		
Supervisor Name:	Peter Performance	Employee ID:	123456789		
Supervisor Title:	Goals Director	Employee Title:	Evaluation Specialist		

UNIVERSITY OF NORTH CAROLINA STRATEGIC PLAN

FSU 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>.

FSU’s STRATEGIC PLAN: From a Proud Legacy to a Twenty First Century World Class University of Choice.

FSU’s strategic plan includes: Retention and Graduate Rates, Collaboration and Partnership and Efficiency, Effectiveness and Sustainability. For more information about FSU’s Strategic Plan, please visit <https://www.unccfsu.edu/about-us/fsu-leadership/office-of-the-chancellor>.

General Information: This form provides a template for managers to provide the annual performance review for EHRA Non-Faculty employees. Each EHRA Non-Faculty employee should receive a written annual performance evaluation covering the immediately preceding July 1 through June 30, and this review should be delivered and discussed with the employee no later than July 15 of each year.

Employees with start dates after the previous July 1 should have the review cover the period from their start date to June 30; employees who been in their present position less than 90 days as of June 30 may have an optional review or await the next performance cycle for completion of the required annual review at the manager’s option.

INSTRUCTIONS FOR COMPETING THE PERFORMANCE FORM:

- Beginning of Review Period (July or at time of hire)**
1. Complete identification information above.
 2. Identify at least three (3) to five (5) goals for the year based on key business needs and strategic initiatives
 3. Discuss professional development activities with the employee and documents them in the Professional Development section below.
 4. Employee and supervisor retain copy of PMP form.
- During Review Period (July 1 – June 30)**
1. Update goals as necessary and use form as basis for providing feedback.
- End of Review Period (June)**
1. Evaluate performance and document performance under Annual Performance Evaluation section of this form. Consider performance during entire period.
 2. Provide overall performance rating. Comments should be included for any goal that was below expectations or exceeded expectations.
 3. Sign and date form.
 4. Forward original signed form to Office of Human Resources.

GOALS AND OBJECTIVES

At the beginning of the performance cycle, the supervisor sets at least three (3) to five (5) goals for the year based on key business needs and strategic initiatives.

GOAL:	Provide Accurate and Timely Educational Guidance and Assistance to Students
Description:	Complete all designated educational transactions to facilitate degree completion, to include but not limited to, transcript evaluation, declaration of major (when required), creation of educational degree plan, registration, and drop/ add through accurate transfer of information and reliable record keeping. Offer additional guidance to facilitate satisfactory academic progress through early alert flags, course withdrawal, and course repeats. Advisors should be able to describe, interpret, and provide a rationale for academic regulations and institutional procedures.
GOAL:	Implement Retention Strategies
Description:	Maintain up-to date and accurate advising records that are easily accessible. Proactively engage students and monitor progress towards degree completion through Bronco Connect (early alerts) and through degree evaluation software. Complete all standard student affairs paperwork for course substitutions, catalog changes, waivers, approval to take courses at another institution, transfer equivalencies, etc. in an accurate and timely manner.
GOAL:	Be Available and Accessible to Students, Faculty, and Supervisors
Description:	Be available for student advisees on a regular basis and be accessible through multiple avenues of communication (e.g., office visits, email, telephone conversations, internet links). Office hours should be posted on the advisor's office door and in Bronco Connect. Such messages are to include instructions on how the student can make appointments through administrative staff and how students can get assistance if the Advisor is unavailable (e.g., door signs, voice mail messages, and "out of office" email messages). Advisors should plan for extended hours during First Steps events and registration advising times
GOAL:	Contribute to University and Major Recruitment
Description:	Participation in preparations for and attendance at on-campus recruitment events, such as Fall Pre-View, Spring Open House, First Steps, Orient action, Majors Fair, etc. Participate in off-campus recruitment, as necessary. Support recruitment campaigns for freshmen, transfer students and part-way home students as requested by internal stakeholders.
GOAL:	Ensure Good Customer Service and Engagement
Description:	Provide quality customer service to all internal and external stakeholders during personal visits, over the telephone, and via email. Demonstrate effective communication skills (oral and written). Refer students to relevant institutional resources when academic issues and personal problems require intervention by other university personnel (e.g., Office of Financial Aid, Student Accounts, Bronco Star, Health Services, Office of Personal Development). Engage with student success initiatives offered by other academic, administrative and student affairs units.

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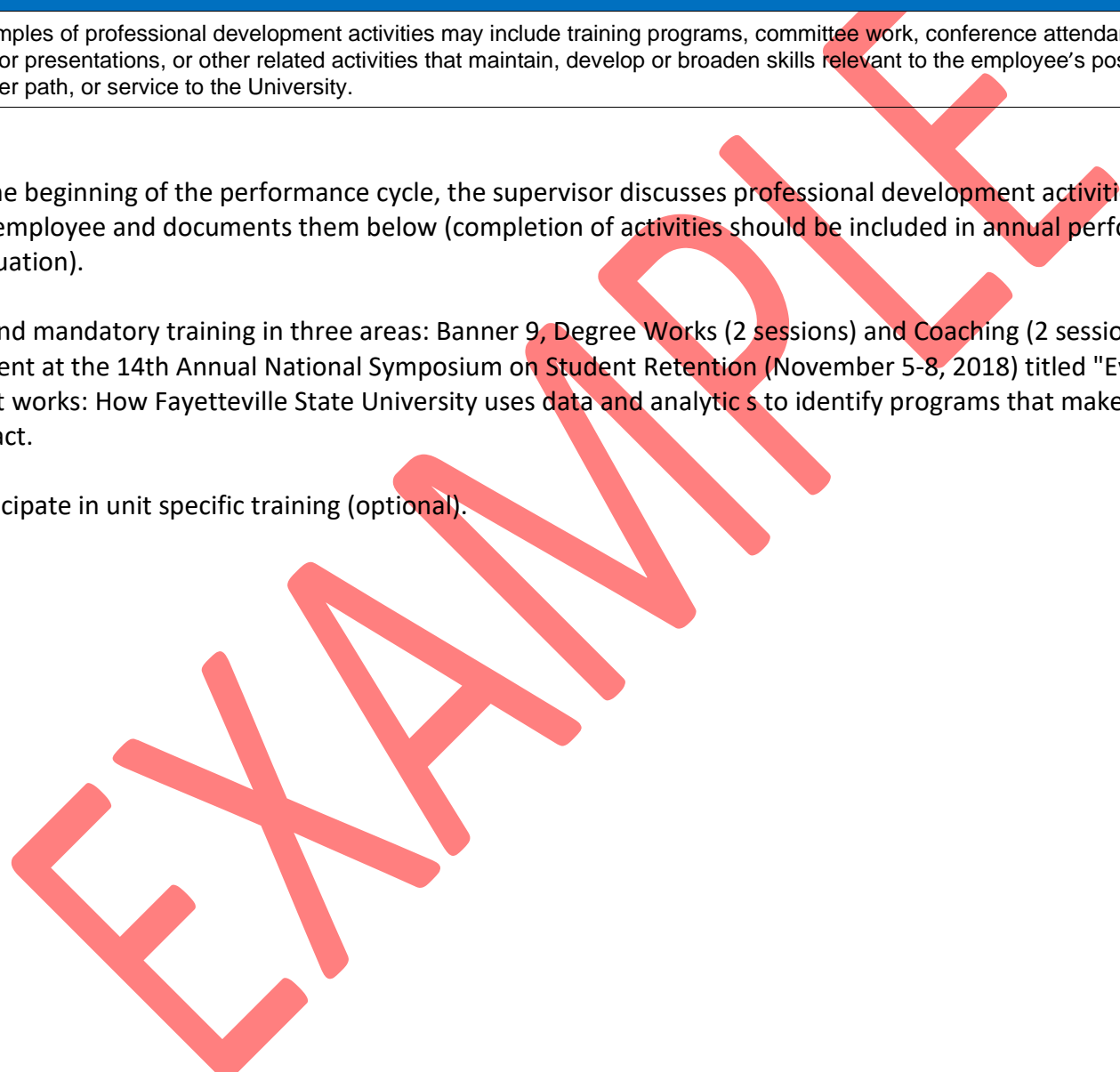
PROFESSIONAL DEVELOPMENT ACTIVITIES

Examples of professional development activities may include training programs, committee work, conference attendance and/or presentations, or other related activities that maintain, develop or broaden skills relevant to the employee's position, career path, or service to the University.

At the beginning of the performance cycle, the supervisor discusses professional development activities with the employee and documents them below (completion of activities should be included in annual performance evaluation).

Attend mandatory training in three areas: Banner 9, Degree Works (2 sessions) and Coaching (2 sessions). Present at the 14th Annual National Symposium on Student Retention (November 5-8, 2018) titled "Evaluating what works: How Fayetteville State University uses data and analytics to identify programs that make an impact.

Participate in unit specific training (optional).



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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, as well as other expectations communicated during the cycle.

Date of Review:	June 21, 2019
Supervisor Comments:	<p>Goal 1: Provide Accurate and Timely Educational Guidance and Assistance to Students</p> <ul style="list-style-type: none"> Mr. Bronco completed all designated educational transactions to facilitate degree completion including, transcript evaluation, declaration of major, creation of educational degree plan, registration, and drop/add through accurate transfer of information and reliable record keeping. He offered additional guidance to facilitate satisfactory academic progress through early alert flags, course withdrawal, and course repeats. Mr. Bronco described, interpreted, and provided a rationale for academic regulations and institutional procedures from the undergraduate course catalog, FSU Student Handbook, and academic/student affairs policy. <p>Goal 2: Implement Retention Strategies</p> <ul style="list-style-type: none"> Mr. Bronco maintained up-to date and accurate advising records in Bronco Connect. These records are easily accessible. He proactively engaged students during fall/spring semesters and monitored progress towards degree completion through BroncoConnect (early alert s)/student success plans and through Degree Works degree evaluation software. <p>Goal 3: Be Available and Accessible to Students, Faculty, and Supervisors</p> <ul style="list-style-type: none"> The academic advisor was available for student advising daily and was accessible through multiple avenues of communication (e.g., office visits, email, telephone conversations, internet links, etc.). Office hours to facilitate the setting up of appointments were posted on the advisor's office door and in BroncoConnect. <p>Goal 4: Contribute to University and Major Recruitment</p> <ul style="list-style-type: none"> Mr. Bronco attended many on-campus students-recruitment events in the review period including Fall Preview, Spring Open House, First Steps, Orientation, and Major Fair. He also took the initiative in organizing off-campus recruitment effort in many community colleges in North Carolina including Sampson Community College where he made a strong <p>Goal 5: Ensure Good Customer Service and Engagement</p> <ul style="list-style-type: none"> Mr. Bronco provided quality customer service to all internal and external stakeholders during personal visits, over the telephone, and via email. He demonstrated effective communication skills (oral and written). He referred students to relevant institutional resources when academic issues and personal problems required intervention by other university personnel (e.g., Office of Financial Aid)

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. The "Supervisor's Comments" section must include justifications for overall ratings of "exceeding expectations" or "not meeting expectations".

- **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	<input type="checkbox"/>	MEETING EXPECTATIONS	<input checked="" type="checkbox"/>	NOT MEETING EXPECTATIONS
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The employee's signature does not signify agreement with the evaluation but affirms that he or she has discussed the evaluation with the supervisor.

SIGNATURES FOR ANNUAL PERFORMANCE EVALUATION

Supervisor:	<i>Peter Performance</i>	Date:	**/**/****
Employee:	<i>Bronco Bob</i>	Date:	**/**/****