**Transfer Review/Annual Appraisal**



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| **Date Prepared:** | Choose date from calendar. | **Review Period** *(Dates From/To):* | yyyy | **to** | Last day. |
| **Employee Name:** | Enter employee name. | **Employee ID:** | Enter ID. |
| **Employee Job Title:** | Former job title. | **Department:** | Former department name. |
| **Supervisor Name:** | Former supervisor’s name. | **Supervisor Title:** | Former supervisor’s title. |

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| **APPRAISAL INSTRUCTIONS**  |
| * Use the rating scale to evaluate your former employee's performance for this cycle, up to when they left your supervision.
* If you rate any goal as “not meeting” or “exceeding” expectations, it is required that you describe the performance that led to these ratings.
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| **INSTITUTIONAL GOALS** ([*Click here for Institutional Goals Guide and performance level descriptions*)](https://hr.charlotte.edu/sites/hr.charlotte.edu/files/media/ForEmployees/NTS%20Institutional%20Goals%202019.pdf) |
| **EXPERTISE** [ ]  ***Not Meeting Expectations*** [ ]  ***Meeting Expectations*** [ ]  ***Exceeding Expectations***  |
| Produces work that is accurate, thorough, and demonstrates sufficient analysis and decision-making to meet the requirements of the employee’s position and profession. Makes efficient and appropriate use of materials and documents work appropriately. Looks for ways to improve efficiency or quality. Maintains technical skills and relevant professional credentials. |
| Enter comments here as desired or required. |
| **ACCOUNTABILITY**[ ]  ***Not Meeting Expectations*** [ ]  ***Meeting Expectations*** [ ]  ***Exceeding Expectations***  |
| Completes required volume of work by established deadlines and stays productive throughout workday. Generally, completes work with few reminders and/or infrequent oversight. Takes sufficient/appropriate measures to plan and organize work, prioritize tasks, and set realistic goals. Seeks needed information to complete work and timely communicates status with relevant parties. |
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| Enter comments here as desired or required. |
| **CUSTOMER-ORIENTED**[ ]  ***Not Meeting Expectations*** [ ]  ***Meeting Expectations*** [ ]  ***Exceeding Expectations***  |
| Listens to determine the most effective way to address customer needs and concerns. Shows a solid understanding of customer needs, seeks out customer input to better understand needs, and develops ideas to meet those needs. Follows through on commitments, despite time pressures or obstacles, and maintains relevant communication with customers until the job is completed. Maintains a professional and respectful tone and exhibits diplomacy when dealing with frustrated individuals or during sensitive or confrontational situations. |
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| Enter comments here as desired or required. |
| **TEAM-ORIENTED** [ ]  ***Not Meeting Expectations*** [ ]  ***Meeting Expectations*** [ ]  ***Exceeding Expectations***  |
| Communicates and engages directly, clearly, and tactfully with colleagues. Provides feedback and healthy dialogue on performance and operational issues, as requested, willingly adapts to change, and adheres to decided actions. 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. Absences are infrequent and do not place an undue burden on supervisor or colleagues. |
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| Enter comments here as desired or required. |
| **COMPLIANCE & INTEGRITY** [ ]  ***Not Meeting Expectations*** [ ]  ***Meeting Expectations*** [ ]  ***Exceeding Expectations***  |
| Complies with personnel and equal opportunity policies, including prohibitions on harassment, discrimination, and violence, and all other policies, including appropriate use of university resources. Complies with all safety requirements for the position, including successful completion of training and proper use of personal protective equipment. Chooses ethical action under pressure, avoids situations that are inappropriate or that present a conflict of interest, and holds self and others accountable for ethical decisions. Appreciates individual/cultural differences and treats all people with dignity and respect. |
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| Enter comments here as desired or required. |
| **SUPERVISION** (if applicable) [ ]  ***N/A*** [ ]  ***Not Meeting Expectations*** [ ]  ***Meeting Expectations*** [ ]  ***Exceeding Expectations***   |
| Provides adequate stewardship of assigned resources, including budget, space, equipment, and staffing. Provides clear objectives that foster work unit development and align with university values and goals. Provides candid, timely, and constructive feedback on performance and behavior, hires individuals with the qualities and skillsets for success, and contributes to meeting University EO and affirmative action goals. Serves as role model and engenders trust, commitment, and civility. |
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| Enter comments here as desired or required. |
| **INDIVIDUAL GOALS** ([*Click here for the Individual Goals – Rating Scale Guide to determine the proper appraisal rating*](https://hr.charlotte.edu/sites/hr.charlotte.edu/files/media/ForEmployees/NTS%20-%20Individual%20Goal%20Rating%20Scale.pdf)) |
| **GOAL #1 - NAME:** | Summary description of goal. |
| **Performance Comments:** Comments required. |
| [ ]  ***Not Meeting Expectations*** [ ]  ***Meeting Expectations*** [ ]  ***Exceeding Expectations***  |
| **GOAL #2 - NAME:** | Summary description of goal. |
| **Performance Comments:** Comments required. |
| [ ]  ***Not Meeting Expectations*** [ ]  ***Meeting Expectations*** [ ]  ***Exceeding Expectations***  |
| **GOAL #3 - NAME:** | Summary description of goal. |
| **Performance Comments:** Comments required. |
| [ ]  ***Not Meeting Expectations*** [ ]  ***Meeting Expectations*** [ ]  ***Exceeding Expectations***  |
| **GOAL #4 - NAME:** | Summary description of goal. |
| **Performance Comments:** Comments required. |
| [ ]  ***Not Meeting Expectations*** [ ]  ***Meeting Expectations*** [ ]  ***Exceeding Expectations***  |
| **GOAL #5 - NAME:** | Summary description of goal. |
| **Performance Comments:** Comments required. |
| [ ]  ***Not Meeting Expectations*** [ ]  ***Meeting Expectations*** [ ]  ***Exceeding Expectations***  |
| **COMMENTS ON EMPLOYEE’S OVERALL PERFORMANCE (**Required – Attach additional comments if necessary.) |
| Enter comments here as desired or required. |
| **Next Level Supervisor Approval** *(Have signed or send Email Confirmation from Next Level Supervisor approving appraisal)* |
| **Name:** | Enter Name of Next Level Supervisor. | **Title:** | Enter Title of Next Level Supervisor. |
| **Signature:** |  | **Date:** | . | [ ]  Email confirmation provided |