Competency Assessment Guide

Employee Name:		**Supervisor Name:**	
Function/Department:		**Employee Job Title:**	
Review Period:	**thru**	**Clock Number:**	

COMPETENCY GUIDE

Instructions: *Listed below are ten "Foundational Competencies" along with a general description. For each competency, there are also behaviors and/or skill examples listed. Rate each behavior/skill applicable to the employee for each competency of focus during the review perion. Place an* ***"x"*** *in the appropriate box (Competent or Development Area). Additional skills or behaviors specific to the job roll can be added in the blank spaces provided.*

Level 1 - Fundamental

1.1 Organizational Skills: Exhibits ability to plan, organize and prioritize workload effectively. Effectively manages time.		**Competent**	**Development Opportunity**	**Employee Initial**	**Manager Initial**
1.1.1	Demonstrates a willingness to share ideas and perspectives and encourages others to do the same.				
1.1.2	Organizes ideas in a clear, logical flow that can easily be followed by others.				
1.1.3	Interacts effectively with others in both favorable and unfavorable situations.				
1.1.4	Effectively allocates time for specific tasks and/or workload.				
1.1.5	Meets deadlines and uses time wisely.				

1.2 Communication Skills: Communicates effectively and professionally with staff and customers. Uses tact and interpersonal skills to develop rapport.		**Competent**	**Development Opportunity**	**Employee Initial**	**Manager Initial**
1.2.1	Speaks in a concise, clear manner and presents organized ideas.				
1.2.2	Listens effectively; documents information and assignments.				
1.2.3	Summarizes or paraphrases understanding of what speaker says in questions or comments to verify understanding and prevent miscommunication.				
1.2.4	Nonverbal behavior is appropriate to situation and/or workplace.				

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1.2.5	Uses appropriate writing style consistent with organizational guidelines.				
1.2.6	Written documents and communication include correct spelling, grammar and punctuation.				
1.3 Reliability/ Attendance: Adheres to work schedule and complies with attendance and leave policies. Exhibits a high level of dependability in all aspects of the job.		**Competent**	**Development Opportunity**	**Employee Initial**	**Manager Initial**
1.3.1	Employee adheres to work schedule and complies with attendance and leave policies.				
1.3.2	Employee's pattern of attendance does not interfere with the assigned duties and responsibilities.				
1.3.3	Reports to work on time and communicates schedule changes promptly to supervisor.				
1.3.4	Begins work on time.				
1.3.5	Functions effectively under critical and tight deadlines, heavy workloads, and/or other pressures.				
1.4 Adaptability: Demonstrates ability to adjust to changes in job, stress, deadlines, assignments, methods, personnel, or surroundings with little difficulty.		**Competent**	**Development Opportunity**	**Employee Initial**	**Manager Initial**
1.4.1	Effectively handles several challenging problems or tasks at once.				
1.4.2	Maintains self-control in all situations.				
1.4.3	Maintains a sense of humor under difficult circumstances.				

1.4.4	Deals effectively with pressure and stress.				
1.4.5	Maintains focus and intensity and remains optimistic and persistent, even under adversity.				
1.4.6	Recovers quickly from setbacks.				
1.4.7	Effectively manages own behavior and time, including balancing work and personal life.				
1.5 Accountability: Holds self and others accountable for measurable high-quality, timely and cost effective results. Accepts responsibility for mistakes, is open to coaching and complies with		**Competent**	**Development Opportunity**	**Employee Initial**	**Manager Initial**
1.5.1	Manages performance to achieve expected results.				
1.5.2	Keeps supervisor informed of progress, issues, and potential problems.				
1.5.3	Takes full responsibility for results.				
1.5.4	Identifies and addresses areas of weakness that may affect organizational performance.				
Level 2 - Intermediate					
1.6 Customer Focus: Fulfills the needs of internal and/or external customers by anticipating needs and delivering service accurately and on time.		**Competent**	**Development Opportunity**	**Employee Initial**	**Manager Initial**
1.6.1	Makes customers and their needs a primary focus.				
1.6.2	Develops and sustains productive customer relationships; gains trust of and credibility with customer.				

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1.6.3	Readily readjusts priorities to respond to pressing and changing client demands.				
1.6.4	Quickly and effectively solves customer problems.				
1.6.5	Is accessible and provides prompt, attentive service.				
1.6.6	Asks questions to discover needs and encourages feedback to improve service.				
1.6.7	Lets customers know he/she is willing to work with them to meet their needs.				
1.6.8	Presents a cheerful, positive manner with customers.				
1.6.9	Presents solutions that meet service objectives.				
1.7 Initiative/Quality & Quantity of Work: Self-motivated and seeks additional tasks when assigned work is completed. Willingly does more than the minimum. Produces work with accuracy, completeness, and consistently in timely manner.		**Competent**	**Development Opportunity**	**Employee Initial**	**Manager Initial**
1.7.1	Identifies what needs to be done and takes action before being asked, when the situation requires it.				
1.7.2	Takes prompt action to accomplish objectives and achieve goals beyond what is required.				
1.7.3	Refers appropriate situations to Manager and completes situations that can be handled.				
1.7.4	Consistently delivers high degree of accuracy, thoroughness and attention to detail in work.				
1.7.5	Monitors own work to ensure quality and applies feedback to improve quality.				
1.7.6	Performs a full range of duties and accomplishes acceptable amount of work.				
1.7.7	Completes assignments on or ahead of schedule in an organized, timely manner.				

		☐	☐	☐	☐
		☐	☐	☐	☐
		☐	☐	☐	☐
1.8 Job knowledge, Skills, and Abilities: Possesses skills, knowledge and proficiency to perform job competently.		**Competent**	**Development Opportunity**	**Employee Initial**	**Manager Initial**
1.8.1	Competent and effective in required job skills and knowledge.	☐	☐	☐	☐
1.8.2	Exhibits ability to learn and apply new skills.	☐	☐	☐	☐
1.8.3	Keeps abreast of current organizational policies and developments.	☐	☐	☐	☐
1.8.4	Maintains acceptable level of capability, skill, and thoroughness in effectively accomplishing assigned duties and responsibilities.	☐	☐	☐	☐
1.8.5	Requires minimal supervision.	☐	☐	☐	☐
		☐	☐	☐	☐
		☐	☐	☐	☐
		☐	☐	☐	☐
		☐	☐	☐	☐
Level 3 - Advanced					
1.9 Decision Making: **A**deptness at analyzing facts, problem-solving, decision-making, and demonstrating good judgment. Makes well informed, effective decisions, even when data is limited or solutions produce unpleasant consequences; perceives the impact and implications of decisions.		**Competent**	**Development Opportunity**	**Employee Initial**	**Manager Initial**
1.9.1	Makes timely and sound decisions.	☐	☐	☐	☐
1.9.2	Compares data from different sources to draw conclusions.	☐	☐	☐	☐
1.9.3	Includes others in the decision-making process as warranted to help make the most appropriate decision and to gain buy-in.	☐	☐	☐	☐
1.9.4	Takes calculated risks.	☐	☐	☐	☐

		☐	☐	☐	☐
		☐	☐	☐	☐
		☐	☐	☐	☐
		☐	☐	☐	☐
1.10 Influencing Others: Demonstrates the ability to effectively influence others to listen, commit and act on a new approach.		**Competent**	**Development Opportunity**	**Employee Initial**	**Manager Initial**
1.10.1	Seeks out and builds relationships with others who can provide information, intelligence, career support, potential business, and other ways to help.	☐	☐	☐	☐
1.10.2	Appropriately involves others in a process or decision to ensure their support.	☐	☐	☐	☐
1.10.3	Presents facts, analysis, and conclusions or solutions in a way that demonstrates command of content.	☐	☐	☐	☐
1.10.4	Take a personal interest in others to develop relationships.	☐	☐	☐	☐
1.10.5	Gains the support of others in meeting objectives by acknowledging their resistance and fears, addressing their questions and concerns, and accommodating them to the extent possible without undermining the effort.	☐	☐	☐	☐
		☐	☐	☐	☐
		☐	☐	☐	☐

Development Plan

Instructions: The Development Plan should be used to target specific skills or behaviors within a competency area. It may also be used any time an employee's performance or conduct fails to meet the supervisor's expectations. **The supervisor should focus on only 1 to 2 development opportunities during any given time period (e.g., 30, 60 or 90 days).** Parts A, B, and C must be completed.

Part A. Summarize employee strengths and/or development opportunities.

Part B. Describe the development opportunities for employee along with the start and review date(s).	**Start Date**	**Review Date**

Part C. List development/learning activities and/or resources, to include supervisor's actions, to assist employee with their development.

Development Plan Follow-up

To be completed by the supervisor within a reasonable amount of time after the initiation of the development plan (e.g., 60 days, 90 days). Please place an "x" in the appropriate box and provide any comments.

Supervisor's Comments performance or behavior.	☐ **Employee has satisfactorily progressed in targeted development areas.**	☐ **Employee has not satisfactorily progressed in targeted development areas.**

Employee Comments