Dear Colleagues,

The spirit of the New Pay and Reward Structure (NPRS) is to reward and motivate staff performance through flexible and cost effective use of resources and by building a stronger link between performance and reward. At the time of approving the NPRS in June 2004, the Council advised that the University should build on the strength of the existing Non-teaching Staff Performance Management Process which had already been put in place since 1999 and develop it into a performance-based reward system.

The Performance-based Reward System (PBRS) under the NPRS introduced in January 2006 has maintained the key features of documentation of performance through the Performance Planning and Review Form and the holding of consultative meetings between Supervisors/Heads and colleagues.

Arising from an “internal audit exercise” conducted by the University’s Internal Audit Office, the Staff Affairs Committee (SAC) has considered and recommended a number of measures to enhance the Non-teaching Staff Performance Management Process in May 2010. Since the recommendations would have an impact on the current practices adopted by Deans/Heads and non-teaching staff, all the Deans/Heads were consulted in the first instance in June/July 2010, and then all non-teaching staff through focus group meetings in the months of September to November 2010.

On the basis of the feedback/comments collected from Deans/Heads and non-teaching colleagues, the SAC, has at its meeting held in January 2011, approved all the recommended enhancements for implementation with effect from 1 September 2011. The enhancement measures largely aim to build a stronger link between “annual review” and “annual consultative meeting” and “identification of staff continuous training/development needs”, as well as to strengthen the link between “performance” and “reward”. Relevant sections of the PBRS Manual are now revised to incorporate the changes and provide better guidance to the entire performance management process.

Please kindly spend some of your precious time to read through this Manual. Should you have any comments or further questions on the System, you could either express them directly with your Head of Office/Department/Division or Dean of Faculty/School; or you could address them to the Personnel Office via our e-mail address pers@hkbu.edu.hk.

Last but not least, I would like to take this opportunity to thank all colleagues for your valuable input throughout the consultation process. I look forward to your continued support of the PBRS.

Director of Personnel
May 2011
(First edition 1/06, Revised 5/11)
What is Performance Management?

Performance Management is:

- a process of establishing *shared understanding about what is to be achieved*, and of managing people in a way that increases the probability that it will be achieved;

- a *people management process* to *motivate*, *develop*, and *support* subordinates in their work in order that they can *better contribute* to the organization’s performance; and

- comprised of the following essential elements: *planning*, *motivation*, *support*, and *recognition*.
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THE PERFORMANCE-BASED REWARD SYSTEM FOR NON-TEACHING STAFF

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Vision

The University aspires to be a premier Institution of higher learning providing broad-based, creativity-inspiring education with distinctive contribution to the advancement of knowledge through research and scholarship.

Mission

The University is committed to academic excellence in teaching, research and service, and to the development of whole person in all these endeavours built upon the heritage of Christian higher education.
Core Values

The University’s core values include:
• the pursuit of knowledge and truth through a liberal approach to higher education;
• a collegial environment in which scholarship and academic freedom exist in harmony;
• a vibrant caring community with the presence of Christian ethos in the context of a traditional Chinese value system; and
• a strong commitment to both academic excellence and community service.
The University’s Vision 2020

By the year 2020, the University aims to become the best regional provider of whole person education inspired by

- Quality teaching and learning
- Innovative research
- Dedicated service to the Community

Strategic Theme 1

Enhancement of quality assurance for teaching and learning

Strategic Theme 2

Provision of best value-addedness to HKBU students through excellent teaching and learning environment

Strategic Theme 3

Improvement in attractiveness and agility of HKBU programmes for recruitment of high quality students
Strategic Theme 4
Promotion of research culture which sharpens research performances

Strategic Theme 5
Establishment of a critical mass of research talents

Strategic Theme 6
Promotion of interdisciplinary research and theme-based research

Strategic Theme 7
Proactive contribution to community through knowledge transfer

Strategic Theme 8
Identification of community needs for matching with HKBU strengths to increase contribution to the community
The New Pay and Reward Structure (NPRS) was developed in response to the government’s decision on “deregulation” in July 2003, which led to changes in the funding situation and more intense competition in recruiting and retaining talents in the higher education sector.

The spirit of the NPRS is to reward and motivate staff performance through flexible and cost effective use of resources and by building a stronger link between performance and reward.

Specifically, the NPRS enables the University to:

(a) make use of both UGC funds and non-UGC funds to reward staff;

(b) provide for different forms of rewards (salary adjustment/performance awards/special allowances); and

(c) give out rewards based on staff performance and contributions.
The Performance-based Reward System for Non-teaching Staff

1. OBJECTIVES

The performance-based reward system aims at:

➢ Encouraging self-reflection and a culture of continuous professional development;

➢ Promoting communication, discussion and shared understanding on performance expectations and standards;

➢ Providing timely feedback, advice, appreciation and support to colleagues to encourage them to grow, develop and excel in performance;

➢ Reviewing colleagues’ performance and contributions in accordance with performance expectations and standards; and

➢ Giving recognition, appreciation and rewards based on colleagues’ performance and contributions.
2. BENEFITS TO BE GAINED IN THE SYSTEM

2.1 For You as a Staff Member:

- **Understand** the goals and strategic actions of the Department/Office better, thereby identifying your role/contributing areas and key performance targets;

- Know **what is expected** of you;

- **Facilitate** goal setting and work planning;

- Provide a **channel** to share with supervisors on job difficulties and career aspirations;

- **Receive advice** and support from supervisors;

- **Cultivate** a better sense of **job satisfaction** and accomplishment; and

- **Develop strengths**, potential and enhance performance.
2.2 For You as a Supervisor/Head of Office:

- Communicate and share with staff the goals and strategic actions of the Department/Office, thereby involving staff participation and creating a sense of ownership;

- Facilitate communication with staff on work expectations;

- Provide an opportunity to appreciate, recognise and reward staff for good performance and contributions;

- Provide a channel to listen to concerns and aspirations of staff;

- Provide feedback and advice on improvement areas; and

- Assist staff to plan and implement staff development programmes to enhance performance and career progression.
3. STAFF PERFORMANCE PLANNING AND REVIEW CYCLE

There are three steps in an effective performance planning and review cycle:

- Review of Key Result Areas and Performance Targets
- Evaluate Personal Work Attitude, Attributes and Behaviour; Required Core Competencies; and Service Quality
- Give Feedback/Advice/Recognition/Rewards

Each of these steps will be described in greater detail in the following sections.
3.1 **Performance Review Cycle**

- The Performance-based Reward System for Non-teaching Staff will follow an **annual** cycle.

- Deans and Heads of Offices will adopt “a performance review cycle” for non-teaching staff and make known to staff in the Faculty/School/Office as follows:
  
  - For staff on substantiated/continuous contract/open-ended appointments, the Faculty/School/Office could choose a cycle which will suit the specific work cycle/activities of the Faculty/School/Office, e.g. **September – August, January – December** or **July – June**.

  - For staff on fixed-term contracts with different contract end dates, the performance review cycle will follow their anniversary date of appointment.

- Deans and Heads of Offices will report the annual Performance Planning and Review results to their respective Vice-President or the President and Vice-Chancellor to whom the Faculty/School/Office reports.
3.2 Performance Planning

- Performance planning is a mechanism to encourage proactiveness and facilitate individuals to work effectively with motivation and commitment.

- Staff should consider the following in setting objectives for the year:

  (a) Understand the institutional/departmental/office strategic goals;

  (b) Understand the University’s Performance Expectations on various staff categories and how they apply to you (please refer to Appendix I for “Band Descriptions and Classifications of Various Staff Categories”);

  (c) Set individual specific performance targets to be achieved for the year in consultation with your supervisor (please refer to Appendix II for “Guidelines on Setting Performance Targets”);

  (d) Identify individual competencies which are attributes/behaviour critical for success in achieving the performance targets (please refer to Appendix I for “Requirement of Core Competencies”);

  (e) Discuss with your supervisor and agree on the tasks and standards to be achieved during the year; and

  (f) Discuss with your supervisor and agree on the continuous training/development target(s) for next year.
3.3 **Performance Management**

**Performance Monitoring**

- **Recognizing positive results** - Recognition is one of the most powerful motivators for staff; it maintains constructive work relations and support people's esteem; and it is a tool to achieve personal or departmental excellence; and

- **Taking corrective action** - Inappropriate behaviour, poor work attitude and standards should be corrected during the year, including working out action plans and agreeing on a schedule to correct areas in need of improvement.

**Performance Coaching**

- Coaching is a two-way, energizing process to provide instruction, direction, guidance or encouragement to staff as they work toward achieving performance objectives and key competencies.

**Tips for Success**

Different staff members will need different amount and types of coaching depending on their task knowledge, skills, motivation and confidence in particular situations. Depending on the development level of the person on a particular goal, the supervisor should use the appropriate leadership style to coach and monitor progress.
3.4 Performance Review Process

- Performance review assesses the performance of staff against previously agreed work expectations/objectives.

  - It should be a joint responsibility of the staff and the supervisor.

  - It should relate individual performance to organizational objectives.

  - It should evaluate staff’s achievement of specific performance targets, Personal Work Attitude, Attributes and Behaviour, Required Core Competencies, Service Quality, areas for improvement, advice for development, and special contribution that staff have made to the overall performance of the team/office.

  - Focus on work performance and not individual personality/character.

  - Give suggestions to improve performance with a focus on helping the individual grow and develop.
(a) **Annual Review**

- Non-teaching staff should go through an “Annual Review” as a required practice.

- Within the respective Faculties/Schools/Offices, the timing for the “Annual Reviews” will be according to the established Performance Planning and Review Cycle.
(b) **Annual Consultative Meeting**

- Supervisors and staff are expected to have an Annual Consultative Meeting.

- For Faculties/Schools/Offices which adopt the “Annual Reviews” practice, “Annual Consultative Meetings” may be merged with the “Annual Reviews”.

- In the Annual Consultative Meeting, the discussion could focus on the following:

  (a) work plans and specific performance targets for the next year;

  (b) any anticipated difficulties in implementing work plans and achieving performance targets and ways of resolving them;

  (c) development plans and updating of skills and/or job knowledge;

  (d) review of past year’s performance (with both staff input and supervisor’s comments);

  (e) any identified difficulties in the past year and means of overcoming those problems in future;

  (f) recognition and appreciation of good performance and positive feedback; and

  (g) advice on areas in need of improvement and/or warning of unsatisfactory performance.

*(Please refer to Appendix III for “Guidelines on Preparing for the Annual Consultative Meeting”)*
(c) Additional Input on Colleagues’ Performance

- To increase transparency of the review process and to balance input from more than one reviewer, additional input from more sources can be used as an “optional” assessment tool in the process of performance review.

- Additional Input can be solicited from any, but not limited to the following sources, depending on the job nature of the post:
  - Other supervisors/senior members of the same Faculty/School/Office
  - Peers of the same/different Faculty/School/Office
  - Users
  - Subordinates
  - A moderating review panel

Sample feedback forms can be downloaded from the Personnel Office website.

- Either the supervisor or staff could raise the need to solicit additional input but such suggestion should be agreed upon before the performance review is conducted to avoid negative connotation associated with soliciting additional input.

- In case of disagreement between the supervisor and staff on the need to and/or the method of how to solicit additional input, the final decision should rest with the supervisor after thorough discussion with staff.
(d) **Performance Review Criteria**

- Three main “performance review criteria”: Personal Work Attitude, Attributes and Behaviour, Required Core Competencies and Service Quality, will be used as University-wide guidelines to review the performance of non-teaching staff.

![Non-teaching Staff Performance Review Model](image-url)
**Performance Review Criteria – Examples of Performance Indicators** (For details, please refer to Appendices IV & V)

<table>
<thead>
<tr>
<th>Performance Review Criteria</th>
<th>Examples of Performance Indicators</th>
</tr>
</thead>
</table>
| **Personal Work Attitude, Attributes and Behaviour** | (1) Sense of responsibility, dedication and commitment  
(2) Service attitude towards customers and/or users  
(3) Cooperation and ability to work as a team member  
(4) Ability to work under pressure, emotional stability, capability of openness  
(5) Self-reflection, initiation, proactiveness and willingness to change |
| **For General Grade Staff (Salary Bands A,B,C)** | (1) Job knowledge and skills relevant to the job  
(2) Problem solving skills  
(3) Communication skills |
| **For Executive/Professional Grade Staff (Salary Bands D,E)** | (1) Job knowledge and skills relevant to the job  
(2) Problem solving skills  
(3) Communication/Presentation skills  
(4) Innovation  
(5) Conceptual skills and Analytical thinking  
(6) Planning and Organizing ability  
(7) Leadership ability |
| **For Managerial/Senior Professional Grade Staff (Salary Bands F and Above)** | (1) Job knowledge and skills relevant to the job  
(2) Problem solving skills  
(3) Communication/Presentation skills  
(4) Innovation  
(5) Conceptual skills and Analytical thinking  
(6) Planning and Organizing ability  
(7) Leadership ability  
(8) Strategic thinking  
(9) Negotiation skills |
| **Service Quality** | (1) Completes tasks/Meets performance pledges  
(2) Provides consistently thorough and accurate work  
(3) Meets User Requirements/Expectations  
(4) Applies new ideas/innovations to improve work process and/or final product |
(e) Rating of Performance

- Adopt a 5-level grading scheme (i.e. A, B, C, D, E) with description of the 5 levels as below and as detailed in the Forms.

- Faculties/Schools/Offices which prefer a numerical approach could assign numerical values to the 5-level grading scheme for each of the performance indicators to arrive at a total score (i.e. A=5, B=4, C=3, D=2, E=1).

<table>
<thead>
<tr>
<th>Grade</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A - 5:</td>
<td>Delivered expected results on all objectives and exceeded expectations/position requirements with proactive suggestions and innovative methods to help solve problems and improve quality of work of the office; exceptionally dedicated and committed to work; highly efficient, effective and independent in the discharge of duties; can be completely trusted to carry out job to completion.</td>
</tr>
<tr>
<td>B - 4:</td>
<td>Delivered expected results on almost all objectives. Meets almost all expectations/position requirements in an efficient and effective manner. Can be completely trusted to accomplish work requirements independently.</td>
</tr>
<tr>
<td>C - 3:</td>
<td>Delivered expected results on most objectives. Meets most expectations/position requirements. Dedicated, committed and can usually be trusted to carry out job independently.</td>
</tr>
<tr>
<td>D - 2:</td>
<td>Delivered expected results on some objectives in a manner which will require checking and need guidance/coaching to get most of the jobs done. Marginally meets minimum job/position requirements.</td>
</tr>
<tr>
<td>E - 1:</td>
<td>Failed to deliver expected results on most objectives. Performance below expectations. Needs constant checking, coaching and guidance to get some of the jobs done.</td>
</tr>
</tbody>
</table>
• Faculties/Schools/Offices which prefer a non-numerical approach could balance a staff member’s performance in different areas to arrive at an overall rating.

• In case there is disagreement between the supervisor and staff over the performance review, please refer to section (j).
(f) **Self-review**

- Self-appraisal from the staff should be encouraged. It would be more helpful to **obtain a staff member’s views on how he/she sees his/her own work performance** than just asking for his/her responses to the given rating and what the supervisor has already written on the performance review form.

(g) **Focus on Facts and Data**

- **Objective data**: information that is factual and quantifiable.

- **Critical incidences**: situations in which staff acted in ways that are particularly effective/ineffective in accomplishing parts of the job.

- **General behavioural observations**: examples and evidences of those behaviour.

- **Other data**: information about the staff member’s employment/history, track record of performance, previous reviews, etc.
After each performance planning/review process is completed, the original Performance Planning and Review Forms will be kept by the relevant Head who will give the final endorsement.

The completed Forms will be kept in the relevant Department/Office for the period that the staff member remains in the service of the University. Those Forms should be disposed of by the relevant Department/Office if the staff member leaves the University.

It is the responsibility of the supervisor to give a copy of the signed review forms to the staff member for record. Staff is advised to keep a personal set of completed reports during his/her service at the University.

If there is disagreement between the supervisor and a staff member, the supervisor should lodge a copy of the Performance Planning and Review Form with the Personnel Office for record and/or necessary follow-up action.
• Offices concerned may modify and adopt the Performance Planning and Review Forms to suit individual circumstances, except that the following must be retained:

(a) Staff input in the form of self-statement of past year’s work;

(b) Supervisor’s comments on staff performance in the 3 main performance review criteria: Personal Work Attitude, Attributes and Behaviour, Required Core Competencies and Service Quality;

(c) A staff member’s plan for continuous improvement and development;

(d) Supervisor-Staff Dialogue to discuss strengths and weaknesses in performance, as well as performance targets and areas for improvement/development; and

(e) Staff signature to acknowledge writing/reading of the Performance Planning and Review Form, to be signed by the immediate supervisor and counter-signed by Head of Office.

• Modifications to the Performance Planning and Review Forms should be discussed with the Personnel Office to maintain broad consistency across various offices, and are subject to the approval of the Vice-President (Administration) & Secretary.

• A copy of the revised report format should be filed with the Personnel Office.
(i) Linking Performance Review with Continuous Training/Development Needs/Activities

- At the time of filling in the review form, staff should report on continuous training/development activities undertaken during the year and whether these activities have fulfilled last year’s continuous training/development plan, if any.

- Towards the end of the performance review, a continuous training/development plan for the next year should be identified and agreed with staff. There could be two key continuous training/development areas:

  (a) for staff who need to gain proficiency in the current post; and

  (b) for staff who are proficient in the current post and who would like to enhance their capability to prepare for future challenges.

- Effective staff training and development will contribute to organizational effectiveness, enhanced employee satisfaction, increased productivity, new work avenues, and attract and retain good staff.

- Continuous training/development initiatives should be specific and achievable, and provide benefit to the University as well as the staff.

(j) Disagreement

- During the Performance Planning and Review Process, there may be disagreement between a staff member and the supervisor.

- Both the staff member concerned and the supervisor should adopt a positive attitude and an open mind towards resolving differences in views.
• In case there is disagreement between the supervisor and the staff member over the performance review, the staff member should put down his/her views in the form.

• The counter-signing officer, after noting the written disagreement, shall arrange to meet with the staff member and supervisor concerned to understand the reason for disagreement.

• If the disagreement could not be resolved at this level, the dispute could be handled by the next higher level and to the Dean/Head of Office and the respective Vice-President to whom the Faculty/School/Office reports.

• Such records will be presented to and considered by the Non-teaching Staff Review Panel if and when the staff member concerned is presented to the Panel for any personnel-related decisions in future.

• Staff who have any concerns on and/or suggestions for improvement for the Planning and Review Process could also write directly to the Director of Personnel.

(k) Reporting of Results to Vice-Presidents/President and Vice-Chancellor

• The Deans and Heads of Offices will report the annual Performance Planning and Review results to their respective Vice-President or the President and Vice-Chancellor to whom the Faculty/School/Office reports, and discuss follow-up actions for any special staff cases requiring attention and identified staff continuous training/development needs.
3.5 Confidentiality

- All matters discussed between the supervisor and the staff member together with the information submitted to the relevant Head for endorsement must be kept confidential.

- Only the staff member, the relevant supervisor/Section Head, and the Head of Department/Office concerned can have access to the completed performance planning/evaluation reports.

- In the Personnel Office, only those staff who need to have access to the information in the reports in the course of performing their duties may have access to them.
Let us plan and manage Performance to achieve Job Success
4. REWARD STRATEGIES

- The University, in planning the budget allocation, will take into consideration the provision for salary adjustment/rewards.

- Based on the performance review results, the Deans and Heads of Offices will consider ways to motivate, recognize, support and reward staff performance and contributions, including but not limited to the provision of monetary rewards subject to policy guidelines set out in the following paragraphs.
4.1 **Salary Adjustment/Salary Increase**

- As the New Pay and Reward Structure is aimed at building a stronger link between performance and reward, salary adjustment for colleagues who have not yet reached the maximum salary level of their respective ranks will be subject to performance review. At the same time, the University will also take into consideration **funding availability**, **external comparability** and **internal relativity** in rewarding staff performance.

- At around January every year, the Staff Affairs Committee (SAC) will consider update market pay level and pay trend surveys, cost-of-living adjustments, and salary adjustment practices of the other UGC-funded institutions, and will provide reference guidelines to Faculties/Schools/Offices for salary adjustment for the coming year. The reference guidelines will recommend, based on the above factors, an **average percentage of salary adjustment for staff who have not yet reached the maximum of their respective salary ranges, and who have obtained grades “A” to “C” in performance.**

- In the event that there is a need to respond to cost-of-living adjustments in the Civil Service and market pay trends, the SAC may recommend a percentage of “general adjustment” applicable to all staff, subject to the approval of the Council.
At around May every year, the Senior Executive Committee will consider the budget for the University and the Faculties/Schools/Offices for the next financial year and/or next triennium, and will inform the Faculties/Schools/Offices of the funding that could be allocated to support staff costs, including basic salary and salary adjustment, if any.

Each Faculty/School/Office will review staff who have not yet reached the maximum of their respective salary ranges and decide on whether to recommend appropriate salary increase for these staff based on the following considerations:

(a) the funding situation within the Office, including the possibility of using both/either UGC funds and/or non-UGC funds to support the salary adjustment;

(b) external comparability based on market reference data and the practices of other UGC-funded institutions;

(c) internal relativity of staff salary levels in comparison with the performance and contributions of staff in the Faculties/Schools; and

(d) staff performance.

For staff who are on fixed-term contracts, their re-appointment and salary review will be considered at the same time. For staff who are already on substantiated/continuous contract/open-ended appointments, their salary review will follow the “performance review cycle” adopted by the Faculty/School/Office to facilitate budget planning and performance review of staff concerned at the same time.
To build a stronger link between salary adjustment and performance, Faculties/Schools/Offices are advised to provide performance ratings for all staff recommended for salary adjustment.

Recommendations on salary increase with performance ratings shall be forwarded by the Head of Department to the Dean of Faculty/School or Head of Office to the respective Vice-President or President and Vice-Chancellor to whom the Office reports for approval. The respective Vice-President or President and Vice-Chancellor should oversee and moderate the recommended percentage of salary increase of staff in different Faculties/Schools/Offices under their purview. Any special adjustments above or below the recommended percentage increase of the year should be supported by full justifications.

In the event of any disagreement between the supervisor and staff on the percentage of salary adjustment, the case shall be handled by the next higher level of authority and moderated by the Dean or Head of Office. If the case cannot be resolved at Dean/Head of Office level, it should be brought to the attention of the respective Vice-President or President and Vice-Chancellor who will look into the case and their decision shall be final.

In the event the Faculty/School/Office does not have adequate UGC recurrent funds to support salary adjustment, it could choose to make use of “non-UGC funds” to provide for a “one-off award” which will not be added to the staff member’s basic salary.
4.2 **Performance Award**

- Performance Award is designed to facilitate Faculties/Schools/Offices to show recognition and appreciation to colleagues who have demonstrated “excellent” performance and/or made a “special contribution” to the Faculty/School/Office. It can be given out by the Office at the time of performance review of different groups of staff.

- The specific features of Performance Award are:

  (a) It should be “one-off” and not add to the staff member’s basic salary. Provision of Performance Award is discretionary, and it should not be taken as a major part of the remuneration package;

  (b) It could be provided to staff who have already reached the top of their salary ranges and those whose salaries are within the salary ranges, for “outstanding performance” or “special contribution”;

  (c) It could include both monetary and non-monetary values;
(d) The monetary value is capped at a maximum of 10% of a staff member’s basic monthly salary x 12 months. In the event that the recommended amount would exceed this maximum, special justifications should be provided for consideration on exceptional basis by the respective Vice-President or President and Vice-Chancellor to whom the Faculty/School/Office reports;

(e) The Award should be provided to not more than 10% of the total staff strength of the Office at any one time;

(f) The total maximum amount of Performance Award and Special Allowance received by a staff member should not exceed 20% of his/her annual salary, unless otherwise approved by the Vice-President (Administration) & Secretary in consultation with the respective Vice-President or President and Vice-Chancellor to whom the Faculty/School/Office reports, on the ground of exceptional circumstances supported by special justifications; and

(g) Faculties/Schools/Offices are encouraged to make use of non-UGC funds for the provision of Performance Awards.

- Faculties/Schools/Offices are invited to consider and if considered appropriate, consult their staff on how to make the best use of this Performance Award to encourage certain attributes and/or behaviour in the Faculty/School/Office.
Recommendations could be initiated by the Dean of Faculty/School or Head of Office and presented to the respective reporting Vice-President or President and Vice-Chancellor for approval of:

(a) the areas of recognized special contribution or performance behaviour which the Faculty/School/Office would like to promote;

(b) the form and value of the Award;

(c) the decision making process; and

(d) the decision making authority.
4.3 **Special Allowance**

- Under the New Pay and Reward Structure, there is provision of Special Allowance to enable the Faculties/Schools/Offices to recognize certain staff who have shouldered additional duties for an extended period of time, usually related to special assignments/projects/development activities.

- The following guidelines aim to facilitate Faculty/School/Office to make use of this provision:

  (a) Recommendations for the provision of Special Allowance for non-teaching staff could be initiated by the Dean of Faculty/School or Head of Office to the respective Vice-President or President and Vice-Chancellor to whom the Faculty/School/Office reports for approval;

  (b) In presenting the recommendation, the Dean/Head should provide the specific purpose(s) and justifications for granting the Special Allowance, including the staff member’s involvement and contributions during the period for which the allowance is payable;

  (c) Special Allowance could be provided on a monthly basis for a specified period of not more than 12 months in the first instance, subject to review at the end of the period, or provided after the period on a one-off basis. Faculties/Schools/Offices are encouraged to provide Special Allowance on a one-off lump sum basis at the end of a performance review cycle, so that staff in a Faculty/School/Office can be considered at the same time
based on consistent criteria and funding availability. In either case, the allowance should not exceed 10% of a staff member’s basic salary and for a maximum period of 12 months. In the event that the recommended amount would exceed this maximum, special justifications should be provided for consideration on exceptional basis by the respective Vice-President or President and Vice-Chancellor to whom the Faculty/School/Office reports;

(d) Provision of Special Allowance is “discretionary”. It should not add to a staff member’s basic salary, nor be taken as a major part of the remuneration package;

(e) The total maximum amount of Special Allowance and Performance Award received by a staff member should not exceed 20% of his/her annual salary, unless otherwise approved by the Vice-President (Administration) & Secretary in consultation with the respective Vice-President or President and Vice-Chancellor to whom the Faculty/School/Office reports, on the ground of exceptional circumstances supported by special justifications; and

(f) Faculties/Schools/Offices are encouraged to make use of non-UGC funds to provide for Special Allowance.
4.4 Promotion Opportunities

- Under the New Pay and Reward Structure, colleagues who have been performing exceptionally well at their respective ranks and have the potential to advance to a higher rank which normally demands a higher level of achievement and higher level of responsibilities will be considered for promotion subject to the following:

  (a) service needs of the Faculty/School/Office;

  (b) funding availability;

  (c) “job evaluation” which confirms the expanded scope and level of responsibilities are appropriate for the recommended higher rank; and

  (d) merits of the staff member concerned in meeting the expectations and standards of the higher rank.
Appendix I

Band Descriptions and Classifications of Various Staff Categories
<table>
<thead>
<tr>
<th>Band</th>
<th>Non-teaching Positions</th>
<th>Level of Training/Knowledge &amp; Experience</th>
<th>Nature of Position Functions</th>
<th>Requirement of Core Competencies</th>
</tr>
</thead>
</table>
| A    | General                | Non-skilled Workers                     | Perform routine or repetitive work (mainly of a manual nature) and follows clearly prescribed instructions, established procedures and standard practice. | Elementary knowledge of methods and/or the use of utensils and simple equipment to perform manual tasks assigned.  
Understands instructions and service quality standards, and can communicate understandably with others orally. |
|      |                        | No formal training/knowledge/qualifications are required. Some relevant experience may be preferred. |                             |                                 |
| B    | General                | Skilled Workers (special skills/multi-skills) | Perform routine work or technical work of a limited scope, in laboratory/building work/maintenance work, etc.  
Office tasks may include compiling facts and figures according to established procedures and the use of office equipment as directed.  
Work according to prescribed standards and instructions to achieve prescribed results. May solve relatively simple problems covered by manuals and instructions; otherwise questionable matters are discussed with supervisor. | Basic work knowledge of procedures or practices in one area.  
For technical work of a limited scope, the job may require special skills in laboratory/building work/maintenance work, etc.  
For office tasks, the work may require skills in using computer and office equipment.  
In contact with users, the job requires basic communication skills, courtesy and sensitivity to users’ needs. |
<p>|      |                        | Jobs require either general schooling up to Form 5 standard OR specialized training in one specific subject or skill. Some relevant experience will be expected. |                             |                                 |</p>
<table>
<thead>
<tr>
<th>Band</th>
<th>Non-teaching Positions</th>
<th>Band Descriptions</th>
<th>Requirement of Core Competencies</th>
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<tr>
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<td>Level of Training/</td>
<td>Nature of Position Functions</td>
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<td></td>
<td>Knowledge &amp; Experience</td>
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<tr>
<td></td>
<td>Frontline staff who contribute through co-ordination and assistance.</td>
<td>Jobs require multi-skills in the use of either office or technical equipment.</td>
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</tr>
<tr>
<td></td>
<td>Work consists of a range of activities following University policies and guidelines requiring interactions and coordination with others.</td>
<td>Jobs require interpersonal skills in internal and external contacts with service users.</td>
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</tr>
<tr>
<td></td>
<td>Tasks completion requires the use of multi-skills, including prioritizing and organizing tasks, compiling, categorizing, coding, calculating and verifying data using computer software, office or laboratory equipment.</td>
<td>Jobs require some organization skills in coordinating and prioritizing work and some leadership skills in supervision of skilled or non-skilled workers.</td>
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<tr>
<td></td>
<td>Exercise simple judgment and resolve problems at the operational level through analyzing information, selecting appropriate methods, and recommending necessary changes.</td>
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<tr>
<td></td>
<td>Internal contacts involve exchanging information about specific assignments.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>External contacts are related to service relationship with external providers or agents.</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C</td>
<td>General</td>
<td>Supervisors</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Jobs require general schooling with at least 5 passes in HKCEE, with work knowledge of a wide spectrum and preferably some specialized training beyond the secondary level, e.g. a recognized Certificate or Diploma.</td>
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<tr>
<td></td>
<td>Some years of relevant experience will be required.</td>
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</table>
### Requirement of Core Competencies

Jobs require conceptual skills in understanding University policy guidelines and interpreting information and data.

Jobs require verbal and written communication skills.

Jobs require interpersonal skills in internal and external contacts.

Jobs require leadership skills on prioritizing and organizing tasks, coaching as well as motivating team members to achieve standards.

### Nature of Position Functions

Work is moderately different and complex and consists of a range of activities following University policies and guidelines requiring interactions and coordination with others.

For Officers, they will perform work of considerable difficulty and responsibility which require comprehensive work knowledge of the relevant subject matter, procedures and practices; and will solve a diversity of problems at the operational level.

Assistant Officers/Officers are expected to carry out assignments/projects which require some initiative and creativity, judgment and the applications of specialized skills.

Assistant Officers/Officers are expected to carry out assignments/projects which require some initiative and creativity, judgment and the applications of specialized skills.

As a coordinator/an officer-in-charge of a team, they are also expected to allocate and assign tasks, maintain work-flow, and service standards, as well as coach and provide guidance to team members.

Work involves considerable internal and external contacts with outside collaborators, vendors, agencies, or organizations.

<table>
<thead>
<tr>
<th>Band</th>
<th>Position Category</th>
<th>Position Ranking</th>
<th>Level of Training/ Knowledge &amp; Experience</th>
<th>Nature of Position Functions</th>
<th>Requirement of Core Competencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>D</td>
<td>Executive/ Professional</td>
<td>Officers/ Assistant Officers</td>
<td>For Officer level appointment, jobs will normally require a recognized degree with several years of relevant experience. For Assistant Officers, they may perform moderately difficult work which require thorough knowledge of the relevant subject matter, procedures and practices; and may solve unfamiliar but less complex problems at the operational level within established constraints. For Assistant Officer level appointment, the job may require a recognized degree, OR a formal education beyond the secondary level, e.g. recognized Certificate/ Diploma/Associate Degree with substantial years of relevant experience &amp; proven competence.</td>
<td>Work involves considerable internal and external contacts with outside collaborators, vendors, agencies, or organizations.</td>
<td>Jobs require conceptual skills in understanding University policy guidelines and interpreting information and data. Jobs require verbal and written communication skills. Jobs require interpersonal skills in internal and external contacts. Jobs require leadership skills on prioritizing and organizing tasks, coaching as well as motivating team members to achieve standards.</td>
</tr>
<tr>
<td>Band</td>
<td>Non-teaching Positions</td>
<td>Band Descriptions</td>
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<tr>
<td></td>
<td>Position Category</td>
<td>Level of Training/ Knowledge &amp; Experience</td>
<td>Nature of Position Functions</td>
<td>Requirement of Core Competencies</td>
<td></td>
</tr>
<tr>
<td>E</td>
<td>Executive/Professional</td>
<td>Jobs require thorough knowledge of several areas, plus specialized training in one or more subjects.</td>
<td>A Team Leader who oversees the implementation of policies and guidelines and who monitors progress and results of the team.</td>
<td>Able to evaluate the impact of actions on others, and to analyse and improve process.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Senior Officers/Assistant Managers/ Junior Professionals</td>
<td>A recognized degree with substantial years of relevant administrative/specialist experience will be expected.</td>
<td>Assists to develop policies and procedures of the function/team concerned.</td>
<td>Able to solve a diversity of problems requiring understanding and interpretation of principles behind sets of policies and procedures.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Possession of a relevant professional or postgraduate qualification may be required for some jobs.</td>
<td>Responsible to lead a team and spend time to allocate and review work, and eliminate ordinary difficulties. Advise, motivate and provide guidelines, helping team members to develop individual and group objectives and action plan for the achievement of targets.</td>
<td>Able to make use of specialist skills in solving problems at the implementation/operation levels.</td>
<td></td>
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<tr>
<td></td>
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<td></td>
<td>Analyse and improve the University process to meet the needs of customers.</td>
<td>Able to interact with others in an effective and influential manner.</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Explore opportunities and process improvements with effective interpretation of financial, market and management data.</td>
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<td></td>
<td></td>
<td></td>
<td>Investigate and review considerable data which may be varied and complex and require the rearrangement and original interpretation of the data in order to arrive at logical conclusions.</td>
<td></td>
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</tr>
</tbody>
</table>
**Requirement of Core Competencies**

Able to solve diverse and unusual problems requiring considerable evaluation and interpretation of principles behind policies and procedures; adaptation of techniques; and innovative solutions.

Capable of making sound judgment based on conceptual understanding and mastery of a complicated set of rules, regulations, procedures and techniques.

Capable of motivating others to accomplish set targets and objectives.

Displaying a considerable level of creativity, and tact in handling difficult issues and analyzing non-routine problems.

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<table>
<thead>
<tr>
<th>Band</th>
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<tr>
<td></td>
<td><strong>Position Category</strong></td>
<td><strong>Position Ranking</strong></td>
<td><strong>Level of Training/ Knowledge &amp; Experience</strong></td>
</tr>
<tr>
<td></td>
<td>Managerial/ Senior Professional</td>
<td>Managers/ Professionals</td>
<td>Jobs require thorough knowledge of practices, principles and relationship between broad functional areas. A good first degree with solid administrative/specialist supervisory experience, in the relevant field at the supervisory level. Possession of a relevant professional or postgraduate qualification will be required in some professional areas.</td>
</tr>
<tr>
<td>Band</td>
<td>Non-teaching Positions</td>
<td>Level of Training/ Knowledge &amp; Experience</td>
<td>Nature of Position Functions</td>
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<tr>
<td>G</td>
<td>Heads of Smaller Offices/ Heads of Sections/ Senior Managers/ Assistant Directors</td>
<td>Jobs require in-depth knowledge of practices, principles and relationship between broad areas. A good first degree with substantial solid managerial/specialist experience in the relevant field. Possession of a relevant professional or postgraduate qualification is normally expected.</td>
<td>Perform diverse, complex and different sets of functions. The job requires conceptual planning and integration of policies and practices in operations, and coordination of activities. The job requires giving recommendations on policies and procedures which affect operations, relationships or costs. Assume overall line management responsibility for subordinates providing professional/administrative services to users. Plan and execute long-term and short-term resources planning including people, technology and finance etc. Analyse results at team level, develop performance standards, identify performance issues and opportunities with appropriate actions. Make important decisions of a non-routine nature within the constraint of established policies and procedures. Actions may be checked with other senior executives of the University.</td>
</tr>
<tr>
<td>Band</td>
<td>Non-teaching Positions</td>
<td>Position Category</td>
<td>Position Ranking</td>
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</tr>
<tr>
<td>H</td>
<td>Managerial/ Senior Professional</td>
<td>Heads of Smaller Offices/ Heads of Divisions/ Deputy Directors/ Associate Directors</td>
<td>Jobs require high educational attainments and/or a high level of specialized knowledge or techniques through professional training; with expert knowledge of practices, principles and relationship between broad areas. A good first degree plus extensive and solid managerial/specialist experience in the relevant field at a senior level. Possession of a relevant professional or postgraduate qualification is required.</td>
</tr>
<tr>
<td>Band</td>
<td>Non-teaching Positions</td>
<td>Position Category</td>
<td>Position Ranking</td>
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</tr>
<tr>
<td>I</td>
<td>Heads of Offices/ Directors</td>
<td>Managerial/ Senior Professional</td>
<td></td>
</tr>
</tbody>
</table>
Appendix II

Guidelines on Setting Performance Targets
Specific performance targets are not plans of daily regular duties. They should be:

(i) plans for improving regular/ongoing duties; and

(ii) special projects/initiatives to improve the performance of the individual/office.

**Suggestions for setting targets** *(Applicable to both annual key performance and improvement targets)*

1. Begin each target or objective with a [Verb]: "Increase", "Reduce", "Initiate", "Develop", "Lower", "Improve", "Become", "Achieve", and so on.

2. There should be a [Noun] to describe what is to be acted on.

3. Then use a [Measurement], which can, in terms of quality or quantity, describe how well the action is done.

4. A date or [Time] should be set for fulfillment of the objective or target.

**Examples**

**Managerial/Senior Professional Staff**

- Launch (verb) two (measurement) new programmes (noun) to recruit at least 150 students (measurement) by the end of this year (time).

**Executive/Professional Staff**

- Achieve (verb) customer satisfaction rating (noun) of 4 or above (measurement) on a 5-point scale in the survey in June this year (time).

**General Staff**

- Produce (verb) typo-free (measurement) meeting minutes (noun) within 5 working days following the meetings (measurement) during this year (time).

More guidelines on setting performance targets will be available through in-house training workshops and on the e-learning platform.
You may like to adopt a SMART approach in setting targets

SMART is an acronym for what targets should be like:

**S** – specific, significant

**M** – measurable, meaningful

**A** – agreed upon, achievable

**R** – realistic, relevant

**T** – time-bound, timely

**S** – *specific, significant*

What is the task to be done?
Is it a key area of your work?

**M** – *measurable, meaningful*

What evidence could be used to show how well the task has been done?
What will be different if the task is completed?
What are the needs met through completing the task?
A – agreed upon, achievable

Do you understand and agree with the task?
Is the task possible, taking into account your current resources/situation?
Do you need continuous training/development in order to achieve the task? If so, is it included in your continuous training/development plan?

R – realistic, relevant

Why is this target important?
Is it improving your performance?
How does this contribute to achieving the University’s priorities and your department/office’s objectives?
In terms of output, results and behaviour, what will successful completion look like?

T – time-bound, timely

When should the task be completed?
How often should it be done?
If a task is long-term/on-going, have you built in review dates to check progress?
Writing SMART targets

Below are examples of useful language for writing SMART targets:

<table>
<thead>
<tr>
<th>VERB</th>
<th>e.g. improve, set up, review, complete, update, compile, plan, implement, launch, maintain</th>
</tr>
</thead>
<tbody>
<tr>
<td>NOUN</td>
<td>e.g. customer satisfaction rating, new training programmes</td>
</tr>
<tr>
<td>MEASUREMENT</td>
<td>e.g. reduce costs by 5% compared to last financial year</td>
</tr>
<tr>
<td>TIME</td>
<td>e.g. by end June, on a monthly/weekly basis, every 2 months</td>
</tr>
</tbody>
</table>

Examples:

- Improve (verb) customer satisfaction rating (noun) from 3 to 4 (measurement) on a 5-point scale by end of June next year (time).

- Organize (verb) two (measurement) training programmes (noun) on communication skills for General Staff by end of December this year (time).
Appendix III

Guidelines on Preparing for the Annual Consultative Meeting
《Guidelines for those who will be reviewed》

Prepare fully and understand the purpose and the steps of your performance planning and review process.

Think about your JOB
- What are your major duties or your main role?
- What would happen to your team if you did not do your job well?
- What knowledge, skills, and attitude do you need to be successful in your job?

Think about your PERFORMANCE
- How do you rate your performance against the criteria? Quantify your work achievements as far as possible and consider how they have contributed to meeting the targets of your office/unit.
- How has your job changed recently?
- What has/have gone less well? What have you learned as a result of these difficulties? What can you do better during the next period?
- Consider questions that your supervisor might ask you and prepare answers as far as possible.
- Collect evidence of all of your achievements during the review period.

Think about your FUTURE
- What would you like to be doing in future?
- What experience, knowledge, skills, or/and attitude do you need to develop to enable you to achieve your aspirations?
- What are you going to work on during the next period, i.e. your action plan to improve yourself within these areas?

Lastly……
- What support do you need from your supervisor to enhance your current job performance?

REMEMBER: Try to express yourself as much as possible – it is YOUR performance planning and review meeting.
Plan for the Review

- Undergo performance review training yourself to ensure that you are fully prepared, confident, and able to make the best use of this opportunity.
- Avoid surprises – feedback should be on-going and given from time to time, and not saved up until the annual performance planning and review meeting.
- Give your staff enough prompting of the review meeting date and time (at least one week) in advance.
- Prepare fully for the meeting; collect all the information you need.
- Prepare specifically for any ‘tricky bits’ by having specific examples of behaviour and appropriate data on hand.
- Identify and reserve a suitable venue and allocate sufficient time for the discussion. Ensure you will not be disturbed.

Right at the beginning of the performance planning and review meeting, remember to

- Start on time!
- Turn off mobile phones and divert all phone calls.
- Try to establish rapport first before other things.
- Explain the benefits of the performance planning and review meeting from both the supervisor’s and the staff member’s perspectives - be prepared to answer the question "What’s in it for me?"

Discussion – adopt a structured approach for the meeting

- Invite staff to look back on their achievements during the specified period against their agreed objectives.
- Offer your own observations and support these with specific examples.
- Keep the discussion objective and focused; offer honest and factual feedback where appropriate.
- Ensure that your feedback is balanced; focus on the staff member’s strengths as well as continuous training/development areas.
• Focus on solutions rather than defending positions. Look to the future rather than dwell on the past.
• Direct the discussion through questioning to encourage the staff member to do most of the talking. Listen actively to his/her responses instead of thinking of your next question.

Then next .....  
• Discuss with the staff member his/her personal development needs to support the attainment of agreed objectives.
• Discuss how the objectives can be achieved and the support he/she would need.

Action plans  
• List out the agreed objectives based on the SMART model.
• Obtain agreement, summarize the main points, and conclude.
前言

各位同事：

新薪酬及福利架构旨在更灵活及有效地运用资源来嘉许及奖励同事的工作表现，并加强工作表现与奖励的联系。校董会于2004年6月份通过新薪酬及福利架构时，建议大学应以现时计划（即自1999年已实施的「非教学人员工作表现管理计划」）作为基础，发展成为工作表现奖励制度。

在2006年1月推出的新薪酬及福利架构—非教学人员工作表现奖励制度（「奖励制度」）保留了原有制度的主要部份，包括透过工作计划及评估表格记录工作表现和举行上司与同事之间的工作表现评估会议。

基于大学内部审鉴处进行的内部审计调查结果，「教职员事务委员会」於2010年5月就改善非教学人员工作表现计划及评估过程，提出一系列措施。由於措施会影响各学院院长/部门主管和非教学人员现时的安排，人事处在2010年6月/7月先咨询所有学院院长/部门主管，並在2010年9月至11月期间举行了一連串對焦小组咨询各非教学人员。

「教职员事务委员会」在考虑学院院长/部門主管及各同事所表达的意见後，於2011年1月的會议上通過实施所有改善措施，并定於2011年9月1日起生效。改善措施旨在加强「每年工作表现评估」及「每年度工作表现評估會議」與「员工持续培訓/发展重点」之间的关系，並加强「工作表现」與「奬励」的联系。人事處現已修訂『新薪酬及福利架构—非敎學人員工作表現奬勵制度手冊』中的相關内容，並加入有關改善措施及提供更多工作表现評估過程的指引。

懇請你抽空閱讀這手冊。如對「奬勵制度」有任何意見或疑問，可直接向部門主管或學院院長提出。你亦可透過人事處的電郵地址(pers@hkbu.edu.hk)提供意見。

最後，本人藉此機會多謝曾在諮詢期間提出寶貴意見的同事。希望大家繼續支持此「奬勵制度」。

人事處處長
2011年5月
(第一版2006年1月，2011年5月修订)
何謂工作表現管理？

工作表現管理是個:

互相溝通的過程：讓員工充分了解部門的工作目標，從而有效地達到部門的目標；

管理的過程：在工作上激勵、發展及支持員工，讓員工為大學作出更大的貢獻；及

匯集工作目標計劃、激勵、支持及認同員工的工作表現等重要元素的制度。
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註：各職位類別的工作表現計劃及評估表格可在人事處的網頁
(http://pers.hkbu.edu.hk/) 下載
願景

香港浸會大學銳意提供啓發創意及多元化的高等教育，透過學術與研究開拓知識新領域。

使命

香港浸會大學在教學、研究及社會服務等範疇力臻至善，秉承基督教高等教育的理念，推行全人教育。
辦學理念

香港浸會大學的辦學理念包括：

- 以自由開放的高等教育觀，追求知識及真理；
- 捍衛學術自由，營造和諧校園氣氛，讓教學與研究齊驅並進；
- 以傳統中國價值觀念為基礎，佐以基督教精神，建立一個有活力及親和的大學社群；及
- 致力追求學術成就及服務社會大眾。
香港浸會大學 2020 年願景

及至 2020 年，香港浸會大學將憑藉以下三大優勢，成爲區內提供全人教育的最佳學府：

- 高質素教與學
- 創新研究
- 致力服務社會

策略綱領 1
提升教與學的質素核證

策略綱領 2
透過卓越的教與學環境，為浸大學生帶來最佳的增值條件

策略綱領 3
增進浸大課程的吸引力和靈活性，務求招收高質素的學生
策略綱領 4
提倡研究文化，提升浸大的研究成績

策略綱領 5
薈萃研究人才，發揮效應

策略綱領 6
提倡跨學科和主題研究

策略綱領 7
通過知識轉移，積極和主動地貢獻社會

策略綱領 8
了解社會需要，配對浸大長處，增添浸大對社會的貢獻
新薪酬及福利架構

新薪酬及福利架構（「新架構」）是因應政府在 2003 年 7 月讓大專院校的薪酬和福利與公務員“脫鈎”，從而改變撥款情況及導致高等教育界在招聘和挽留人才方面加強競爭而發展的機制。

「新架構」旨在透過靈活及有效地運用資源來嘉許及鼓勵工作表現優秀的同事，及加強員工工作表現與獎勵的連繫。

「新架構」的好處是讓大學可以:

(a) 使用「教資會」資助及「非教資會」的款項來獎勵同事；
(b) 以不同的方式來獎勵同事的工作表現（包括調整薪酬/發放工作表現獎金/特別津貼）；及
(c) 按同事的工作表現與貢獻來獎勵同事。
工作表現獎勵制度旨在：

- 鼓勵自我評估，建立持續專業發展的機構文化；
- 讓上司與同事之間對工作表現的期望與標準多作溝通、討論及達成共識；
- 向同事提供適時的回應、建議、讚賞及支持，以激勵同事持續發展及提升工作表現；
- 按照工作表現的期望與標準，評估同事的工作表現與貢獻；及
- 根據同事的工作表現與貢獻，給予肯定、讚賞及獎勵。
2. 制度的好處

2.1 對員工的好處

- 讓你明白部門的目標與策略，以及個人在部門擔任的角色和作出貢獻的目標；
- 讓你清楚了解部門對你工作表現的期望；
- 幫助你訂立工作目標以及計劃；
- 讓你有機會與主管分享在工作上所遇到的困難，以及對事業的期望；
- 讓主管為你提供意見與支持；
- 讓你得到更大的工作滿足感與成就感；及
- 讓你發展個人的長處，潛能以及提升工作表現。
2.2 對上司/部門主管的好處

- 讓你與員工分享有關部門的目標與策略，令員工更積極參與，增加對工作的投入感；

- 讓你與員工溝通對工作的要求；

- 讓你對員工的良好表現及貢獻表示讚賞，認同及獎勵；

- 讓你聆聽員工所關注的事情以及對工作的期望；

- 讓你向員工作出回應，表達需要改善的地方；及

- 協助員工制訂並實行發展計劃，藉以提高工作表現及發展事業。
3. 工作表現計劃及評估的步驟

工作表現計劃及評估有三個主要步驟：

I. 計劃
- 主要成果
- 制訂目標
- 發展計劃

II. 管理
- 嘉許良好工作表現
- 改善工作表現
- 提供意見及輔導

III. 評估
- 檢討主要成果及目標
- 評估個人工作態度、素質與行爲表現；工作所需的主要個人才能；及工作/服務質素
- 給予回應/意見/肯定/獎勵

每一步驟將於往後篇幅作詳細描述。
3.1 工作表現評估週期

- 「非教學人員工作表現奬勵制度」一般以一年為一個週期。

- 學院院長/部門主管可因應各學院/部門工作的運作選擇不同的「工作表現評估週期」，並告知同事其評估的時間:
  - 已獲實任/連續性合約/長期聘約的同事 - 學院/部門可因應工作的週期/活動，選擇不同的評估時間表：例如9月至8月、1月至12月或7月至6月。
  - 合約制的同事 - 可在其週年入職日期評估工作表現。

- 學院院長/部門主管會向直屬副校長或校長匯報每年的評估結果。
3.2 工作表現計劃

➢ 工作表現計劃是一個鼓勵員工採取主動及促使員工受到激勵而提高工作成效和使命感的機制。

➢ 同事應考慮以下因素去設定本年的工作目標:

(a) 了解大學/部門的策略性目標；

(b) 清楚明白大學對不同職級員工工作表現的要求，並思考如何能達到要求（請參閱附錄一「職級分類與描述」）；

(c) 與上司討論並制訂該年度的個人目標（請參閱附錄二「制定工作表現目標指引」）；

(d) 了解個人才能，即技能/行爲如何達致工作的成功表現（請參閱附錄一內的「須具備的主要才能」）；

(e) 與主管討論及共同制訂本年工作表現及準則的計劃；及

(f) 與主管討論及共同制訂來年的持續培訓/發展目標。
3.3 工作表現管理

視察員工工作表現

➤ 嘉許員工的良好工作表現 – 認同員工的工作表現是最有效激勵員工的方法，而且能夠保持良好的工作關係，對員工表示尊重，從而協助員工達到個人或部門的目標；及

➤ 作出改善行動 – 對於不當的行爲、惡劣的工作態度及工作表現，必須加以糾正。主管應告知員工需要改進的地方，訂定行動計劃及時間表，務求改善員工的工作表現。

工作表現的輔導

➤ 輔導員工的工作表現是雙向的：在員工努力達成工作表現目標的同時，主管應為員工提供輔導、指引、領導或鼓勵。

成功秘訣

由於不同員工需要不同程度及形式的輔導，因此主管在給予輔導時，必須考慮個別員工的工作知識、技能、推動力及在特定情況下的自信心。主管應靈活採取不同的領導方法來指引員工，及按照個別員工完成目標的程度來督促進展。
3.4 工作表現評估過程

- 評估員工工作表現時，必須根據以往同意訂立的工作要求/目標為準則。
  
  • 員工與主管應共同承擔工作表現評估的責任。
  
  • 員工個別的工作表現應與部門整體的目標相符。
  
  • 評估工作表現時，主管應評估員工能否達到所訂立的工作目標，其個人工作態度，素質與行爲表現，工作所需的主要個人才能，服務質量，需要改善之處，發展空間，以及員工為團隊/部門所作出的特別貢獻。

成功秘訣

- 討論的重點是工作表現，而不是員工的個性或品格。

- 給予意見時，主要是幫助對方改善及發展。
(a) 每年度工作表現評估

- 非教學人員必須要每年評估工作表現一次。

- 在個別學院/部門內，每年評估工作表現的時間會根據學院/部門已設立的工作表現評估週期而定。
(b) 工作表現評估會議

- 上司與同事應每年進行一次工作表現評估會議。

- 學院/部門如採用每年度「工作表現評估」的制度，可把每年一次「工作表現評估會議」及「工作表現評估」合併。

- 在工作表現評估會議中，可集中討論以下事項：

(a) 明年的工作計劃與具體的工作表現目標；

(b) 預期在實行工作計劃和達成工作表現目標時可能遇到的困難及解決方法；

(c) 員工的發展計劃，包括學習與工作有關的最新技能及或知識；

(d) 檢討員工過去一年的工作表現（員工作出自我評估及主管給予評語）；

(e) 討論員工過去一年所遇到的困難，並提出將來遇到同樣困難時的應對措施；

(f) 對工作表現良好的員工，給予肯定及讚賞；及

(g) 討論需要改善的地方以及/或對工作表現欠佳的員工發出警告。

(請參閱附錄三「準備每年工作表現評估會議指引」)
(c) 其他評估者的意見

- 爲增加透明度及平衡單一評估者的意見，在評估過程中，可收集其他評估者的意見，作爲「選擇性」的評估工具。

- 可根據工作的性質來收集其他評估者的意見，包括但不限於透過以下的途徑：
  - 同一學院/部門內的其他上司/高層人員
  - 學院/部門內或外的同級同事
  - 服務使用者
  - 下屬
  - 小組評估委員會

收集其他評估者意見的表格範本可於人事處網頁下載。

- 上司或同事可提出需要加入其他評估者的建議，但雙方必須在工作表現評估前作出決定，以免在收集其他評估者意見時產生誤會。

- 如上司及同事對於「是否需要收集其他評估者意見」或對「收集意見的方法」有不同意見，上司應與同事詳細討論後才作出最後決定。
(d) 工作表現評估準則

- 大學在評估非教學人員的工作表現時，會按照以下三項「工作表現評估準則」作出評估：個人工作態度、素質與行為表現，工作所需的主要個人才能，及工作/服務質素。

非教學人員工作表現評估模式

大學期望「輔助服務」部門的策略性目標：
- 簡化工序
- 工作效率及成效
- 服務對象/使用者的滿意程度

工作/服務質素

個人工作態度、素質與行為表現

工作所需的主要個人才能
### 工作表現評估準則 — 工作表現指標舉例
（詳情見附錄四及五）

<table>
<thead>
<tr>
<th>工作表現評估準則</th>
<th>工作表現的主要指標（舉例）</th>
</tr>
</thead>
</table>
| 個人工作態度、素質與行爲表現 | (1) 責任感，工作積極投入程度  
(2) 服務態度，能滿足客戶/服務對象需要的程度  
(3) 與團隊在工作上的合作態度  
(4) 可以應付工作壓力，情緒穩定，保持開放態度的能力  
(5) 能夠自省及工作態度主動，願意改變的態度 |

<table>
<thead>
<tr>
<th>一般員工（廣分職級 A、B、C）</th>
<th></th>
</tr>
</thead>
</table>
| (1) 具備工作所需的知識與技能  
(2) 解決問題的能力  
(3) 溝通能力 |

<table>
<thead>
<tr>
<th>執行/專業人員（廣分職級 D、E）</th>
<th></th>
</tr>
</thead>
</table>
| (1) 具備工作所需的知識與技能  
(2) 解決問題的能力  
(3) 溝通/表達能力  
(4) 創新建議  
(5) 思考技巧與分析能力  
(6) 計劃及組織能力  
(7) 領導才能 |

<table>
<thead>
<tr>
<th>管理/高級專業人員（廣分職級 F 或以上）</th>
<th></th>
</tr>
</thead>
</table>
| (1) 具備工作所需的知識與技能  
(2) 解決問題的能力  
(3) 溝通/表達能力  
(4) 創新建議  
(5) 思考技巧與分析能力  
(6) 計劃及組織能力  
(7) 領導才能  
(8) 策略性思考能力  
(9) 操服能力 |

<table>
<thead>
<tr>
<th>工作/服務質素</th>
<th></th>
</tr>
</thead>
</table>
| (1) 準時完成工作/達到工作表現的承諾  
(2) 工作表現穩定，辦事用心仔細，準確無誤  
(3) 工作達至用者的要求/期望  
(4) 構思創新的方法來改善工作程序與效果 |

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(e) 工作表現評級

- 採用 5 個評分等級（A，B，C，D，E），而每個等級的描述，已詳細列於下表及「工作計劃及評估表格」內。

- 學院/部門倘使用「計分方法」，可於每一等級給予評分，然後將分數加起來得出「總評分」（即 A = 5 分，B = 4分，C = 3分，D = 2分，E = 1分）。

<table>
<thead>
<tr>
<th>等級</th>
<th>評分</th>
<th>描述</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>5</td>
<td>達到職位的所有要求並超越期望，主動提議創新方法來解決問題及具備改善工作的質素；對工作充滿熱誠；能快捷、有效及獨立完成工作，完全可信賴能夠妥善完成工作。</td>
</tr>
<tr>
<td>B</td>
<td>4</td>
<td>達到職位的絕大部份要求/期望，能快捷有效完成工作，工作投入積極，完全可信賴能夠獨立妥善完成工作。</td>
</tr>
<tr>
<td>C</td>
<td>3</td>
<td>達到職位的大部份要求/期望，工作熱誠及在一般情況下可信賴能夠獨立妥善完成工作。</td>
</tr>
<tr>
<td>D</td>
<td>2</td>
<td>僅達到職位的最低要求/期望；需要別人核對工作及指導完成工作。</td>
</tr>
<tr>
<td>E</td>
<td>1</td>
<td>未能達到職位的大部份要求/期望，需不斷的指導及監督下完成部份工作。</td>
</tr>
</tbody>
</table>
學院/部門倘希望用「評級方法」，則可根據同事在各方面的表現給予「總評級」。

如上司與同事對工作表現的評估有不同的意見，請參閱（j）部處理方法。
(f) 自我評估

- 上司應鼓勵員工作出自我評估。讓員工表達自己對個人工作表現的看法，比要求員工對評估作出回應更有效。

(g) 注重事實與數據

- 客觀數據：符合事實及可量化的資料。
- 重要事件：員工以往在哪種情況下，工作表現會顯得較為出色/強差人意。
- 日常行爲的觀察：該等行爲的例證及證據。
- 其他資料：員工過往受僱資料/背景，過往的評估記錄等。
(b) 工作表現評估表格及記錄

- 當工作表現計劃/評估過程完結後，員工的「工作計劃及評估表格」的正本將會由所屬部門的主管簽署並保存。

- 員工在大學任職期間，其「工作計劃及評估表格」應由所屬部門保存，直至該員工離職或轉到其他部門工作為止。

- 上司有責任給予有關員工一份已簽署的評估表格副本以供保存。員工在大學服務期間，應自行保存一套完整的報告副本。

- 如在工作表現評估會議內，員工與主管意見不合時，則該評估表格必須提交人事處作爲記錄及/或跟進。
各部門可因應個別的需要而對評估表格的內容作出適當的修訂；惟修訂後必須保留以下的內容：

(a) 員工評述自己過去一年的工作；

(b) 上司按員工在三項「工作表現評估準則」的工作表現給予意見，包括：個人工作態度、素質與行爲表現、工作所需的主要個人才能及工作/服務質素；

(c) 員工作出個人持續改善及發展的計劃；

(d) 上司與員工討論內容，包括其工作表現、優點及缺點，以及新的工作表現指標及需改善/發展的地方；及

(e) 員工閱讀表格後的簽署，以及由直屬上司簽署及部門主管覆核簽署的部份。

若部門需要修訂「工作表現評估表格」內容，應與人事處商討，務使各部門所訂立的標準能保持一致，並獲行政副校長暨秘書長批准。

修改後的表格副本應遞交人事處保存。
(i) 工作表現評估與持續培訓/發展需要/活動

- 在填寫評估表格時，員工應報告在過去一年參與的持續培訓/發展活動，並指出那些活動是否達到該年的持續培訓/發展目標(如適用)。

- 在評估的最後階段，應與員工訂立明年的持續培訓/發展計劃，並針對以下兩項重要的持續培訓/發展方向：
  (a) 為員工提供適當及有效的培訓，以提升現職的工作質素；及
  (b) 對工作表現良好的現職員工，可提供多方面的培訓，以提升才能及準備將來的發展。

- 為員工提供培訓與發展機會，可提升部門的工作效率，增加員工的滿足感，促進生產力，為員工增加新任務機會，以吸引與挽留工作表現良好的員工。

- 持續培訓/發展的計劃應該是實際可行的，並應對大學整體及個別員工有所裨益。

(j) 處理不同意見的方法

- 在進行工作表現評估期間，員工與主管的意見可能出現分歧。

- 員工與主管應以正面及開放的態度，處理彼此意見不合的情況。
• 如員工與主管對評估結果持有不同的意見，員工應把其意見填寫於表格內。

• 覆核的上司應會見有關員工及主管，以了解雙方分歧的原因。

• 如未能解決雙方的分歧，應由上一級主管及其所屬學院院長/部門主管以至直屬的副校長協調處理。

• 當有關員工將來因某項人事決定，而需接受「非教學人員評估委員會」評估時，其與主管意見分歧的評估記錄將會提交該委員會作參考。

• 倘若員工對計劃中任何部份感到關注及/或欲提供改善意見，可直接致函人事處處長。

(k) 向直屬副校長或校長匯報評估結果

• 學院院長及部門主管每年應向直屬副校長或校長匯報評估結果，並討論個別需跟進的員工個案及員工的持續培訓/發展需要。
3.5 保密

- 所有提交部門主管作覆核簽署的資料，以及在會議中員工與主管雙方討論的事情，應予以保密。

- 只有有關員工、評估的主管/組別負責人，以及部門主管有權索取該工作表現計劃/評估報告的資料。

- 人事處同事只有在進行有關職務所需的情況下，才會索取評估報告的資料。
讓我們共同計劃及管理
工作表現
務求取得圓滿成果
4. 奬勵策略

➢ 大學在每年訂定財政預算時會一併考慮用作加薪／其他奬勵的撥款。

➢ 學院院長／部門主管可根據評估結果考慮各種激勵、肯定、支持、奬勵同事的工作表現及貢獻的方法，包括不限於金錢上的奬勵。學院院長／部門主管可根據以下指引以不同方式奬勵同事的工作表現和貢獻。 
4.1 薪酬調整/增薪

- 「新架构」著重加强工作表现与奖励的连繫，故此仍未达顶薪的同事的薪酬调整，将与工作表现挂钩。同时，在决定薪酬调整时，大学亦会考虑到财政状况、对外的竞争力及内部相对公平等因素。

- 约在每年的一月份，「教職員事務委員會」會参考最新的市場薪酬水平及趨勢調查、生活指數調整、其他教資會資助院校的薪酬調整情況等資料，然後向各學院/部門提供未來一年的薪酬調整指引。該薪酬調整指引會按上述的因素，建議一個平均的薪酬調整幅度（百分比）給仍未達頂薪而工作表現達到“A”至“C”等級的同事。

- 如該年度大學有需要因應公務員生活指數的調整及市場薪酬水平而作出一般薪酬调整，「教職員事務委員會」會建議「基本調薪」幅度百分比，由大學校董會考慮及通过。
約在每年的五月份，「校務委員會」將考慮大學整體與各學院/部門在未來財政年度與/或未來三年的財政預算後，通知各學院/部門獲分配的撥款，以支付基本調薪及薪酬調整（如適用）的金額。

各學院/部門將考慮下列因素以決定是否調整未達頂薪同事的薪酬：

(a) 學院/部門的財政狀況 — 包括是否需要使用「教資會」及/或「非教資會」的款項，來支付調薪金額的可能性；

(b) 對外的競爭力 — 考慮學院/部門內同事的薪酬水平與市場的參考數據及其他教資會資助院校的薪酬水平比較是否具競爭力；

(c) 內部同事薪酬水平的相對性 — 考慮同事的薪酬對比學院/部門其他同事的工作表現與貢獻是否對稱；及

(d) 同事的工作表現。

學院/部門將會在同一時間考慮合約制同事的續約與薪酬調整；至於已獲實任/連續性合約/長期聘約的同事的薪酬調整，學院/部門可以考慮採取統一的「工作表現評估週期」來一併考慮，以便同時進行財政預算及同事的工作表現評估。
為加強薪酬調整與工作表現的連繫，各學院/部門應為所有可獲薪酬調整的同事給予工作表現等級。

學系主任可向所屬學院校長或部門主管可向所屬副校長/校長提交調整同事薪酬的建議，並提供工作表現等級。副校長或校長將監察及有權調整其所屬學院/部門的同事的建議增薪幅度（百分比），任何高或低於建議增薪幅度（百分比）應有充分的理據支持。

如直屬主管和同事在薪酬調整幅度上有分歧意見，可由直屬主管的上級處理，並由該學院院長/部門主管協調。如未能在學院院長/部門主管的層面下解決，可提交有關副校長或校長考慮，其決定將為最終的決定。

如學院/部門未有足夠的「教資會」撥款支付調薪，可選擇使用「非教資會」款項向同事提供「一筆過」、不計算在基本月薪內的獎勵。
4.2 工作表現獎

「工作表現獎」讓學院/部門肯定及讚賞在工作上獲「卓越表現」評價的同事，及/或在該年度對學院/部門有「特別貢獻」的同事。學院/部門可按「工作表現評估」的結果頒發「工作表現獎」給同事。

「工作表現獎」的特點如下：

(a) 奖賞是一次過的，不會計算在同事的基本薪金內。「工作表現獎」並非必然發放的，不應被視為薪酬福利的主要部分；

(b) 可以頒發給「工作表現卓越」的或有「特別貢獻」的同事，當中包括已達所屬職級頂薪或未達頂薪的同事；

(c) 可包括金錢或非金錢的獎賞；

(d) 獎賞的價值上限為同事基本月薪的 10% x 12 個月。如超過同事基本月薪的 10% x 12 個月，必須提出合理的
原因，並獲有關學院/部門所屬的副校長或校長按其特殊情況作出批核；

(e) 每次獲獎賞同事的數目應不多於該部門職員總人數的 10%；

(f) 每位同事獲發的「工作表現獎」及「特別津貼」的總金額不能多於同事基本年薪的 20%。如超過此金額，必須經由行政副校長暨秘書長及有關學院/部門所屬的副校長或校長討論，是否基於特殊情況並有充分理據的支持下，作出批核；及

(g) 學院/部門應儘可能使用「非教資會」的款項來支付「工作表現獎」。

➢ 學院/部門可以考慮及諮詢同事如何善用「工作表現獎」來獎勵某些工作素質及/或行爲表現。

➢ 「工作表現獎」的細則須由學院院長或部門主管提交其學院/部門所屬的副校長或校長審批，包括：

(a) 學院/部門欲推廣及確認的「特別貢獻」或「優秀表現」；

(b) 獎勵的形式及金額；

(c) 決定過程；及

(d) 決定負責人。
4.3 特別津貼

在「新架構」下，學院/部門可以透過提供「特別津貼」，來表揚某些同事長時間兼負額外工作，而這些額外工作通常與學院/部門的特別職務/項目/發展活動有關。

「特別津貼」一般的指引如下：

(a) 「特別津貼」可由學院院長/部門主管建議，經所屬副校長或校長批核；

(b) 在作出建議時，學院院長/部門主管需提供明確的目標及合理原因，包括同事在提議發放特別津貼的期間參與的工作和作出的貢獻；

(c) 「特別津貼」可以在指定時段內每月發放，首次不應多於12個月，以後須作檢討；或其後一次過發放。學院/部門應儘可能以一次過形式及在完成「工作表現評估週期」後發放「特別津貼」，以便學院/部門可以同時按統一標準及當時的財政狀況作出決定。在一般情況下，「特別津貼」不應超過同事基本月薪的10% x 12個月。如超過此數目，必須提出合理的原因，並獲有關學院/部門所屬的副校長或校長按其特殊情況作出批核；
(d) 「特別津貼」並非必然發放的，不會計算在同事的基本月薪內，也不應被視為薪酬福利的主要部分；

(e) 每位同事獲發的「特別津貼」及「工作表現獎」的總金額不應多於其基本年薪的 20%。如總金額超過此數目，必須經行政副校長暨秘書長及有關學院/部門所屬的副校長或校長考慮後，認爲是基於特殊情況並有充分理據，作出批核；及

(f) 學院/部門應儘可能使用「非教資會」的款項來支付「特別津貼」。
4.4 晉升機會

在「新架構」下，工作表現特別出色及有潛質晉升至較高職級，並能達到更高職級要求及擔任更高職責的同事都有機會獲晉升考慮，主要的考慮因素如下：

(a) 個別學院/部門因工作/服務需要開設較高職位或擴大現有職責範圍和權責；

(b) 財政狀況；

(c) 有關職位能否根據「職位評估」以確定所擴大的職務範圍及職責符合所建議較高的職級；及

(d) 同事的工作表現與才能是否能夠勝任較高職級的要求與標準。
附錄一

職級分類與描述
<table>
<thead>
<tr>
<th>職級</th>
<th>非教學職位</th>
<th>類別</th>
<th>等級</th>
<th>所需的訓練／知識與經驗</th>
<th>職能性質</th>
<th>須具備的主要才能</th>
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<tbody>
<tr>
<td>A</td>
<td>一般員工</td>
<td>非技術人員</td>
<td>A</td>
<td>毋須任何正規的訓練／知識／學歷。具相關工作經驗者優先。</td>
<td>按既定的指示、程序及一般慣常工作方式，執行例行或重複的工作（主要以體力爲主）。</td>
<td>對工作方法、需要使用的用具和或操作簡單儀器有基本的認識，以致能完成指派的工作。了解工作指示與服務素質的標準，能與他人作良好的口頭溝通。</td>
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<td>B</td>
<td>一般員工</td>
<td>技術人員 (擁有特別技能／多項技能)</td>
<td>B</td>
<td>須具備一般中五教育程度，或曾就某特定範疇／技能接受專門訓練。須具備相關的工作經驗。</td>
<td>執行某一範圍內的例行或技術工作，如實驗室／室宇裝備／維修工作等。</td>
<td>對某一範疇的工作程序／慣常工作方式有基本認識。執行某幾種類例行的技術工作時，須具備實驗室／室宇裝備／維修工作等有關技能。執行辦公室工作，須具備電腦知識，並懂得使用其他辦公室設備。與服務使用者接觸時，須具備基本的溝通技巧，誠懇態度，並能了解他人的需求。</td>
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<td>職級</td>
<td>非教學職位</td>
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<td>C</td>
<td>一般員工</td>
<td>須具備至少香港中學會考五科合格的學歷，有豐富的工作知識，並曾接受中學程度以上的專門訓練，例如擁有認可的證書或文憑。</td>
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<td>前線督導人員</td>
<td>須具備使用辦公室設備或技術器材的多種技能。</td>
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<td>須具備使用辦公室設備或技術器材的多種技能。</td>
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<td>須擁有良好的人際關係技巧，能與校內、校外的服務使用者作有效溝通。</td>
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<td>須擁有基本的組織能力，協調及安排工作，並須具有基本的領導才能，以督導技術或非技術人員。</td>
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<td>負責協調及協助性質的前線工作。</td>
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<td>須按大學政策及指引，與其他同事溝通及協調，以處理及完成各種工作。</td>
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<td>須運用多種技能完成工作，包括使用電腦軟件、辦公室或實驗室設備等，安排和組織工作，對資料進行整理、分類、編碼、計算及核對。</td>
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<td>能作簡單的判斷，透過資料分析、選擇適當方法，並提供可行的建議，以解決運作上遇到的問題。</td>
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<td>在校內需要就特定工作跟其他同事溝通和交換資訊。</td>
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<td>在校外需要跟有關的服務提供者或機構聯絡。</td>
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<td>項次</td>
<td>行政職級</td>
<td>執行／專業人員</td>
<td>職位類別</td>
<td>職等</td>
<td>所需的訓練／知識與經驗</td>
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<td>D</td>
<td>主任／助理主任</td>
<td>職位等級</td>
<td>主任職級，主任職級，一般須具備認可的大學學位，以及數年相關的工作經驗。</td>
<td>主任職級的員工，須對工作範圍、程序及慣常處事方式具有透徹的認識，能處理較簡單的工作。</td>
<td>須具備概念分析能力，明瞭大學政策及指引，並能分析資料及數據。</td>
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<td>助理主任職級，須對工作範圍、程序及慣常處事方式具有透徹的認識，以處理一般難度的工作；並能在既定的條件限制下，解決在運作上遇到的不熟悉但較簡單的問題。</td>
<td>助理主任職級的員工，或須具備認可的大學學位，或擁有至少中學程度以上的學歷，例如擁有認可證書／文憑／副學士學位，並具數年相關的豐富實質工作經驗及才能。</td>
<td>須擁有良好的書寫及說話表達能力。</td>
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<td>助理主任職級，主任職級的員工，或須具備認可的大學學位，或擁有至少中學程度以上的學歷，例如擁有認可證書／文憑／副學士學位，並具數年相關的豐富實質工作經驗及才能。</td>
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<td>須具備良好的人際關係技巧，能與校內、校外人士溝通。</td>
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<td>執行／專業人員</td>
<td>高級主任／助理經理／初級專業人員</td>
<td>須具備若干範疇的透徹知識，加上一門或以上的專業訓練。</td>
<td>作爲小組領袖，須監督政策及指引的執行，並監管理組員的工作進度及成績。</td>
<td>能夠評估行動對他人的影響，並分析及改善運作程序。</td>
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<td>須具備認可的大學學位，以及多年相關的豐富實質行政／專業經驗。</td>
<td>協助制定有關部門／小組的政策及程序。</td>
<td>能夠明確政策及程序背後的原則，以解決種種相關的問題。</td>
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<td>某些工作或須具備相關的專業或高於學士學位學歷。</td>
<td>負責領導小組，細心分配及審核工作，解決一般的難題。透過提供意見、激勵士氣、給予指引，協助組員訂立個人及小組共同的目標，並為達成目標制定行動方案。</td>
<td>能夠運用專業技能，解決執行／運作上的問題。</td>
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<td>分析及改善大學運作程序，以配合服務對象的需要。</td>
<td>能有效詮釋財務、市場及管理數據，從中考慮及謀求改善運作程序。</td>
<td>能夠有效與他人交流溝通，並在溝通過程中能說服／影響他人。</td>
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<td>需要蒐集及審核相當多而複雜的數據，當中或須將數據重新編排及作全新的詮釋，以達到合理的結論。</td>
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<td>職級</td>
<td>非教學職位</td>
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<td>F</td>
<td>管理／高級專業人員</td>
<td>須對某一廣泛職能範圍內的專業知識、一般工作程式及原則並各職能範疇之間的關係具有透徹的認識。具備良好的大學學位，並具備相關職能範圍內豐富的行政／專業督導經驗。某些專業範疇的職務，須具備相關的專業或高於學士學位的學歷。</td>
<td>能夠全面評估與詮釋政策及程序背後的原則，以解決種種不尋常的問題，並能靈活運用技能，找出創新的解決方案。能在廣泛職能範圍內履行一系列種類較多、複雜及一般難度的職務，並須與其他學系、部門、商業機構或大學各部共同協作，以達至目標。能夠在概念上認識與掌握複雜規則、條例、程序及技能，並按此作出精明的判斷。能夠在一所廣泛職能範圍內，在極少督導下，相當獨立地執行職務。能夠成為一個小組團隊的領導，需要分析小組的成績，訂定績效標準，制定工作表現要訣及配合時機與相關行動。分析過程中包括蒐集及審核相當多而複雜的數據，當中須對數據重新編排及作個人的全新詮釋，以達至合理的結論。能夠處理複雜事務及分析非慣常出現的問題，發揮創意，並能夠隨機應變。需要與校內、校外人士作廣泛接觸，在接觸過程中需要適當提供適合資訊／有關材料，表述及討論較難解決的問題，隨機應變，以取得他人的合作及認同。</td>
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<td>高級專業人員</td>
<td>須具備的主要才能</td>
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<td>職位類別</td>
<td>職位等級</td>
<td>所需的訓練／知識與經驗</td>
<td>職能性質</td>
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<td>較細部門的主管／支部主管／高級經理／助理主任／助理所長／助理處長</td>
<td>履行各種各樣較複雜不同的職務。（此職務並不單只在一個廣泛的職能範圍內。）須懂得概念規劃，在運作上結合政策及慣常處事方式，並統籌協調各項活動。</td>
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<td>須對某一廣泛職能範圍內的專業知識、一般工作程式及原則並各職能範疇之間的關係具有透徹的認識。具備良好的大學學位，並具有相關職能範圍內豐富的行政／專業督導經驗。一般須具備相關的專業或高於學士學位的學歷。</td>
<td>提出並協助制定對影響運作、關係或成本的政策及程序。全面承擔某幾個職能範圍內管理下屬的責任，為服務使用者提供專業／行政的服務。</td>
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<td>規劃及執行長期及短期有關人力、科技及財務資源安排的計劃。</td>
<td>在溝通接觸上，需要適當提供相關資訊／材料，表述及討論較難解決的問題時，隨機應變，以取得他人的合作及認同。</td>
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<td>分析小組的成績，訂定績效標準，制定工作表現要訣及配合時機與相關行動。</td>
<td>在解難能力方面，須具有精闢的分析技巧及高度創新的精神，並精密掌握相關專案領域內專門而複雜的知識。</td>
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<td>在既定政策及程序的條件限制下，需作出非經常性重要決策。這些非經常性重要決策／行動或需諮詢大學其他高級行政人員。</td>
<td>須懂得概念規劃，在運作上結合政策及慣常處事方式，並統籌協調各項活動。能夠為所主管的支部或學系作出獨立的判斷與決策。</td>
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<td>H</td>
<td>管理／高級專業人員</td>
<td>較細部門的主管／分部主管／副主任／副所長／副處長</td>
<td>須擁有高學歷及／或專業知識／技能；對各廣泛職能範疇之內的專業知識，一般工作程式及原則，以及各範疇之間的關係均具有透徹的認識。具備良好的大學學位，加上相關領域上豐富穩固的高層管理／專業經驗。須具備相關的專業或高於學士學位的學歷。</td>
<td>統籌多個範疇、難度頗高及複雜的職務，在過程中須整合與協調大學不同部門、單位或各部的活動，以達至目標。在工作過程中，需要分析影響大學的內、外因素，為分部或幾個範疇制訂具策略性的長遠目標及方案，並承擔所定政策帶來的成果。這工作崗位需要作出對大學運作有深遠影響的重要決策。全面承擔主要職能或分部在協調運作上的責任。制定長遠的方案，訂立績效標準，預測人力需求，定下整體政策及程序。</td>
<td>能夠議訂及影響辦公室／分部的政策發展。能夠就各種非經常出現的難題提出創新的解決方案。具備良好的領導技巧，整合及協調人事，激發同事的士氣，並指導他們達成最終目標。須不時代表辦公室／部門主管，參加校內、校外的重要會議。</td>
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<td>職級</td>
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<td>I</td>
<td>部門主管／主任／所長／處長</td>
<td>須擁有高學歷及／或專業知識／技能；充分掌握各範疇之內的專業知識，一般工作程式及原則，並各範疇之間策略性的關係。具備良好的大學學位，加上相關領域上豐富而廣博的實質高層管理／專業經驗。須具備相關的專業或高於學士學位的學歷。</td>
<td>執行關鍵的策略性任務及極為複雜的工作。全面承擔部門在工作表現及工作效率上的責任，當中涉及整合與協調大學不同部門、單位或各部的活動，制定績效標準，訂立長遠資源分配的計劃。需要分析大學與所屬部門在整體表現上還需努力及改進的地方。分析影響大學的內、外因素，為部門制定完整的策略性方案及目標，以配合大學現在與未來的需要。規畫並領導主要的工作及計劃項目，管理及訂立政策及長遠策略。作出對大學有深遠影響的重要決策，可能會對大學的整體路向及運作產生中至長期的影響。能夠有效溝通，與所有相關校內校外人士洽談接觸，包括跟供應商、社區領袖、行政人員或其他外界團體進行具難度的協商工作，而其結果會對大學的名譽、服務素質及利益產生重大的影響。</td>
<td>具有出色的領導才能及高度有效的行政管理技巧。能夠高瞻遠觸，具策略性思維；在解決問題上，能作出精闢分析，並有獨到的見解。具備十分有效且得體的溝通、表達及談判技巧。能夠善用資源，計劃與控制財政預算。能夠就沒有程序或指引的事務，發展新理念，並提供高度策略性的解決方案。引領員工認識大學的抱負及價值，積極進取地運用各種方法協助員工朝著這個方向邁進。</td>
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附錄二
制訂工作表現目標指引
成功秘訣

具體的工作表現目標不是常規工作任務，而是：

(i) 改善常規/現有職務的計劃；及
(ii) 改善個人/部門的工作的特殊項目/新發展。

訂定工作表現目標的提議（適用於每年工作表現及工作改進目標）

1. 每個工作表現目標應以動詞 [Verb] 開始：
   “加強”，“減少”，“開始”，“發展”，“減低”，“改進”，
   “成為”，“達到”，如此類推。

2. 應該有個名詞 [Noun] 以表示要做的事情或任務。

3. 再加一個可以質化或量化的量度標準 [Measurement] 去形容事情或任務如何做到。

4. 達成目標所設時限 [Time]。

例子

管理/高級專業人員

- 開辦（動詞）兩個（量度標準）新課程（名詞），在年底前（時限）
  招收不少於 150 名學生（量度標準）。

執行/專業人員

- 於今年六月的調查（時限）時，在以 5 分為滿分的顧客服務滿意指數
  （名詞）中取得（動詞）4 分或以上（量度標準）。

一般員工

- 於本年度內（時限），每次開會後 5 個工作天內（量度標準）準確無誤
  地（量度標準）完成（動詞）會議記錄（名詞）。

要獲取更多制訂工作表現目標指引，可參加人事處舉辦的工作坊或瀏覽人事處的網上學習平台。
你可使用 SMART 方法來制訂目標

SMART 是良好目標所包含的元素的縮寫：
S – specific（明確具體）， significant（重要的）
M – measurable（可量度的）， meaningful（有意義的）
A – agreed upon（雙方同意）， achievable（可達成的）
R – realistic（切實可行的）， relevant（相關的）
T – time-bound（有時限的）， timely（適時的）

你須要完成哪些工作目標？
這是否屬於你的主要工作範圍？

哪些證據可以顯示出你的工作目標完成得多好？
完成工作目標會帶來甚麼成效？
完成工作目標可達到哪些需求？
A – agreed upon, achievable

你是否明白及同意所訂立的工作目標？
就你現時的資源/處境，能否完成所訂立的工作目標？
你是否需要接受個人持續培訓/發展以完成工作目標？如果是，你有否將這些包括在你的持續培訓/發展計劃內？

R – realistic, relevant

為何你的工作目標是重要的？
你的工作目標能否改進你的工作表現？
你的工作目標如何幫助你達成大學及部門的目標？
成功完成你的工作目標會帶來哪些功效、成果和表現？

T – time-bound, timely

你的工作目標該於何時完成？
你的工作目標需要多頻密地去完成？
如果你的工作目標屬於長期性/持續性的，你有否定期檢討其進度？
### 寫下 SMART 目標

以下是寫下 SMART 目標的參考語句：

<table>
<thead>
<tr>
<th>VERB 動詞</th>
<th>例子</th>
<th>改善、建立、檢討、完成、更新、收集、計劃、實施、推行、保持</th>
</tr>
</thead>
<tbody>
<tr>
<td>NOUN 名詞</td>
<td>例子</td>
<td>顧客服務滿意指數、新的培訓課程</td>
</tr>
<tr>
<td>MEASUREMENT 量度標準</td>
<td>例子</td>
<td>與上個財政年度相比，減低成本百分之五</td>
</tr>
<tr>
<td>TIME 時限</td>
<td>例子</td>
<td>六月底前、每月/每星期、每兩個月</td>
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</table>

例子：

- 於明年六月底前（時限），將以 5 分為滿分的顧客服務滿意指數（名詞）由 3 分提升（動詞）至 4 分（量度標準）。

- 於今年十二月底前（時限），為一般員工舉辦（動詞）兩個（量度標準）關於溝通技巧的培訓課程（名詞）。
附錄三
準備每年度工作表現評估會議指引
準備充足，掌握工作表現計劃及評估的目的與步驟。

先想想你的工作

- 你的主要職責與任務是甚麼？
- 如果你負責的工作與任務完成得不好，你的團隊成員將會怎樣？
- 你需要甚麼知識、技能和態度才可以成功地完成工作？

想想你的工作表現

- 你怎樣評核你在各方面的表現？請儘可能量化你的工作成就，並考慮它怎樣配合部門的工作目標。
- 你的工作最近有何改變？
- 有沒有甚麼地方做得強差人意呢？你在困難中學會了甚麼？下次怎樣會做得更好？
- 想一下上司會問你的問題，並儘量預備答案。
- 記錄你評估時段內工作中所有成功的例子。

再想想你的將來

- 你希望將來嘗試哪些工作範圍？
- 你需要增加甚麼經驗、知識、技能及/或建立怎樣的態度，才使你達成工作的展望？
- 你在來年就以上方面將會有什麼計劃改進自己？

最後……

- 你希望上司能怎樣協助你工作上的進步？

記住：這是你的工作計劃和評核—你應儘量表達自己的意見！
給需要督導並替下屬評核工作表現的同事的指引>

計劃評估面談

- 接受面談技巧的訓練，使自己準備充足並有信心充份利用這個面談的機會。
- 應該經常給予下屬回應，提出工作方面的意見，避免等到面談時才突然作出負面評價。
- 預早（至少一星期前）約定面談的日期與時間。
- 為會議作充分準備：把所有資料預備好。
- 就難處理的問題，先預備工作表現的實例和數據。
- 找一個合適的地方，並準備充足的时间傾談。確保你不會受到打擾。

在開始面談時，請記著

- 準時開始！
- 關掉手機及轉駁所有來電。
- 首先應建立溝通關係。
- 從上司與下屬的角度解釋面談的好處－準備解答同事的提問：「這對我有什麼好處？」

討論內容 — 請有系統地進行面談

- 邀請同事講述完成了的工作，並與過去所定的目標作出比較。
- 提出你的觀察並舉例說明。
- 儘量使面談集中要點，持開放的態度並多提事實回應。
• 儘量平衡回應的內容，集中於同事的強項與需要持續培訓/發展的地方。

• 集中討論解決方法。面向將來，不要執拗過去。

• 用問題去鼓勵同事多發言。主動聆聽同事的回應，不要急著發問下一個問題。

再進一步……

• 與同事討論個人發展方向，以協助其達成共同訂立的目標。

• 討論怎樣達到目標及所需支援。

行動計劃

• 按“SMART”方法去訂立共同的目標。

• 取得共識，重複重點並作出總結。
Appendix IV
附錄四

Performance Planning and Review Form
工作表現計劃及評估表格

- General Grade Staff 一般員工
- Executive/Professional Grade Staff 執行/專業人員
- Managerial/Senior Professional Grade Staff 管理/高級專業人員
Performance Planning and Review Form For Non-Teaching Staff
非教學人員的工作表現計劃及評估表格

FOR GENERAL GRADE STAFF (SALARY BANDS A, B, C)
一般員工﹝廣分職級 A, B, C﹞適用

Assessment Period: From __________________ to _____________________
評估時段：由 __________________ 至 ________________________

Personal Particulars of Staff 同事個人資料

<table>
<thead>
<tr>
<th>Name</th>
<th>姓名</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff No.</td>
<td>員工編號</td>
</tr>
<tr>
<td>Position</td>
<td>職位</td>
</tr>
<tr>
<td>Dept/Office</td>
<td>部門</td>
</tr>
</tbody>
</table>

Rating – Score | Definition of Expectations/Standards 等級 – 分數 | 等級的標準 |
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>A – 5</td>
<td>Delivered expected results on all objectives and exceeded expectations/position requirements with proactive suggestions and innovative methods to help solve problems and improve quality of work of the office; exceptionally dedicated and committed to work; highly efficient, effective and independent in the discharge of duties; can be completely trusted to carry out job to completion.</td>
<td>達到職位的所有要求並超越期望，主動提議創新方法來解決問題及具備改善工作的素質；對工作充滿熱情；能快捷、有效及獨立完成工作，完全可信任能夠妥善完成工作。</td>
</tr>
<tr>
<td>B – 4</td>
<td>Delivered expected results on almost all objectives. Meets almost all expectations/position requirements in an efficient and effective manner. Can be completely trusted to accomplish work requirements independently.</td>
<td>達到職位的絕大部份要求/期望，能快捷有效完成工作，工作投入積極，完全可信任能夠獨立妥善完成工作。</td>
</tr>
<tr>
<td>C – 3</td>
<td>Delivered expected results on most objectives. Meets most expectations/position requirements. Dedicated, committed and can usually be trusted to carry out job independently.</td>
<td>達到職位的大部份要求/期望，工作熱誠及在一般情況下可信任能夠獨立妥善完成工作。</td>
</tr>
<tr>
<td>D – 2</td>
<td>Delivered expected results on some objectives in a manner which will require checking and need guidance/coaching to get most of the jobs done. Marginally meets minimum job/position requirements.</td>
<td>僅達到職位的最低要求/期望，需要別人核對工作及指導完成工作。</td>
</tr>
<tr>
<td>E – 1</td>
<td>Failed to deliver expected results on most objectives. Performance below expectations. Needs constant checking, coaching and guidance to get some of the jobs done.</td>
<td>未能達到職位的大部份要求/期望，需不斷的指導及監督下完成部份工作。</td>
</tr>
</tbody>
</table>

Guidance Notes for Filling Out the Form 填表時請留意：

1. Please refer to the guidelines and definitions on Performance Indicators inside the “Manual on New Pay and Reward Structure – Performance-based Reward System for Non-teaching Staff” (the Manual) when completing this form. 請參照『新薪酬及福利架構 – 非教學人員工作表現獎勵制度手冊』內的指引與工作表現指標的等級及定義填寫表格。
2. Please put a “√” in the appropriate box in the form. 請在表格內適當的方格加“√”。
3. Part I is to be filled out first by the Reviewee. 第一部份先由被評核者填寫。
4. Reviewers should fill out comments on Part I and ratings on Part I and Part II. Please also indicate one or two areas of continuous training/development most needed by the Reviewee for next year. 評核者請填寫第一部份上司的評語和評級及第二部份的評級。再選一至兩項被評核者明年最需要持續培訓/發展的地方。
5. Part III should be completed by the Reviewer and Reviewee after discussion. 第三部份應由被評核者及評核者經討論後填寫。
**PART I: Staff’s Self-Statement of Past Year’s Work Performance and Supervisor’s Comments**

第一部份：同事評述自己過去一年的工作表現及上司的意見

<table>
<thead>
<tr>
<th>A. What are your major work assignments/accomplishments and key performance targets set for past year? Please describe them in order of importance and highlight any particular achievements/contributions.</th>
<th>% of Total Workload (100%)</th>
<th>Supervisor’s Comments on Past Year’s Work Performance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.</td>
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<td>2.</td>
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<tr>
<td>3.</td>
<td></td>
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<tr>
<td>4.</td>
<td></td>
<td></td>
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<tr>
<td>5.</td>
<td></td>
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<tr>
<td>6.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Rating on Part I**

第一部份的評級 (50%)

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>

B. Are there any areas that you would like to have done better? 你認為在過去一年內哪些方面能表現得更好？

Any suggestions/methods for improving the work process to resolve the difficulties/obstacles that you have encountered in your job? 就你在工作過程上遇到的困難/障礙，你有甚麼提議/方法去改善？

C. Are there any relevant skills which you would like to develop, or knowledge you would like to acquire? 你希望能培訓/發展哪些技能或增進哪些知識？

Have you undertaken any upgrading of job-related knowledge and skills or continuous training/development activities during the period of review, and have these activities fulfilled past year’s continuous training/development target(s)? 在評估的時段中，你有沒有參與提升和工作有關知識及技能的持續培訓/發展活動？這些活動是否達到過去一年的持續培訓/發展目標？
## PART II: Supervisor’s Feedback on Personal Work Attitude, Attributes and Behaviour; Core Competencies; and Service Quality plus One or Two Area(s) where Continuous Training/Development are most needed (Please “√” as appropriate)

第二部份：上司對同事的個人工作態度、素質與行為表現，工作方面需要的主要個人才能，及服務
質素的意見（包括一至兩項最需要持續培訓發展的地方）（請在適當的方格內加“√”）

<table>
<thead>
<tr>
<th>Personal Work Attitude, Attributes and Behaviour</th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>Develop Need Development Need</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sense of responsibility, dedication and commitment</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
<td>需要培訓發展之度</td>
</tr>
<tr>
<td>Service attitude towards customers and/or users</td>
<td></td>
<td></td>
<td></td>
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<td>Cooperation and ability to work as a team member</td>
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<td>Ability to work under pressure, emotional stability, capability of openness</td>
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<tr>
<td>Self-reflection, initiation, proactiveness and willingness to change</td>
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</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Core Competencies</th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>Develop Need Development Need</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job knowledge and skills relevant to the job</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
<td>需要培訓發展之度</td>
</tr>
<tr>
<td>Problem solving skills</td>
<td></td>
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<td></td>
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<tr>
<td>Communication skills</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Service Quality</th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>Develop Need Development Need</th>
</tr>
</thead>
<tbody>
<tr>
<td>Completes tasks on time/Meets performance pledges</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
<td>需要培訓發展之度</td>
</tr>
<tr>
<td>Provides consistently thorough and accurate work</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meets User Requirements/Expectations</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>(3) and (4) are optional. (3)及(4)可選擇性填寫)</td>
</tr>
</tbody>
</table>

(3) and (4) are optional. (3)及(4)可選擇性填寫。

(Please attach additional comments from peers/users, if any)（如有收集同事/服務使用者的意見，請附有相關文件。）
### Service Quality

<table>
<thead>
<tr>
<th>Rating on Part II (50%)</th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
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<tbody>
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</tbody>
</table>

### Overall Rating (100%)

<table>
<thead>
<tr>
<th>Overall Rating</th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>

(4) Applies new ideas/innovations to improve work process and/or final product

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
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</thead>
<tbody>
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</tr>
</tbody>
</table>

### Supervisor’s Additional Comments

Besides the above evaluation, do you have any other comments/special contribution made by the staff you wish to highlight?

除以上評估外，是否有其他的意見或希望表揚同事曾作出的特別貢獻？
## PART III: Supervisor - Staff Dialogue

### A. Next Year’s Plan

What will be the staff’s key performance targets for next year? 明年的主要工作表現指標是哪些？

(Supervisor and the staff should reach mutual agreement in this respect. 上司與同事應達成協議。)

- 
- 
- 
- 

Please discuss and plan the staff’s continuous training/development target(s) for next year.

請與同事討論及計劃明年的持續培訓/發展目標。

- 
- 

### B. Supervisor’s feedback to staff on his/her performance during the meeting:

就同事的工作表現，上司於討論時提出以下意見：

### C. Staff’s response to supervisor’s evaluation:

同事對上司的評估作出的回應：

(Staff should give his/her response to supervisor’s evaluation during/after the meeting at the earliest convenience. 同事應於討論時或在討論完畢後儘快對上司的評估作出回應。)

---

Signed by 簽署:  

Staff 同事 (Name in block letters 姓名)  

Date 日期  

Immediate Supervisor 直屬主管 (Name in block letters 姓名)  

Date 日期  

Counter signature with additional comments (if any) 覆核簽署及其他意見(如適用):

Section Head/Head of Office/Head of Department/Dean 支部主管/部門主管/系主任/學院院長 (Name in block letters 姓名)  

Date 日期  

EW/CH/SW  
Doc: General Grade Form (revised on: 9-1-06, 26-10-07, 6-12-07, 19-3-10, 31-5-11)
### Performance Planning and Review Form For Non-Teaching Staff

**FOR EXECUTIVE/PROFESSIONAL GRADE STAFF (SALARY BANDS D, E)**

**Assessment Period:** From __________________ to _____________________

**Personal Particulars of Staff**

<table>
<thead>
<tr>
<th>Name</th>
<th>Staff No.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Position</th>
<th>Dept/Office</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Rating – Score</th>
<th>Definition of Expectations/Standards</th>
</tr>
</thead>
<tbody>
<tr>
<td>A – 5</td>
<td>Delivered expected results on all objectives and exceeded expectations/position requirements with proactive suggestions and innovative methods to help solve problems and improve quality of work of the office; exceptionally dedicated and committed to work; highly efficient, effective and independent in the discharge of duties; can be completely trusted to carry out job to completion.</td>
</tr>
</tbody>
</table>

**Guidance Notes for Filling Out the Form**

1. Please refer to the guidelines and definitions on Performance Indicators inside the “Manual on New Pay and Reward Structure – Performance-based Reward System for Non-teaching Staff” (the Manual) when completing this form. 請參照『新薪酬及福利架構－非教學人員工作表現獎勵制度手冊』內的指引與工作表現指標的等級及定義填寫表格。

2. Please put a “✓” in the appropriate box in the form. 請在表格內適當的方格加“✓”。

3. Part I is to be filled out first by the Reviewee. 第一部份先由被評核者填寫。

4. Reviewers should fill out comments on Part I and ratings on Part I and Part II. Please also indicate one or two areas of continuous training/development most needed by the Reviewee for next year. 評核者請填寫第一部份上司的評語和評級及第二部份的評級。再選一至兩項被評核者明年最需要持續培訓/發展的地方。

5. Part III should be completed by the Reviewer and Reviewee after discussion. 第三部份應由被評核者及評核者經討論後填寫。

---

**SAMPLE**

(樣本)
PART I: Staff’s Self-Statement of Past Year’s Work Performance and Supervisor’s Comments

第一部份：同事評述自己過去一年的工作表現及上司的意見

A. What are your major work assignments/accomplishments and key performance targets set for past year? Please describe them in order of importance and highlight any particular achievements/contributions. 請扼要說明你在過去一年所完成的主要工作及工作表現指標，以及特別的貢獻。請按工作或貢獻的重要性列述。

<table>
<thead>
<tr>
<th>% of Total Workload (100%)</th>
<th>Supervisor’s Comments on Past Year’s Work Performance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1. 

2. 

3. 

4. 

5. 

6. 

Rating on Part I 第一部份的評級 (50%)

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
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<tbody>
<tr>
<td>5</td>
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<tr>
<td>4</td>
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<td>1</td>
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</tr>
</tbody>
</table>

B. Are there any areas that you would like to have done better? 你認在過去一年內哪些方面能表現得更好？

Any suggestions/methods for improving the work process to resolve the difficulties/obstacles that you have encountered in your job? 就你在工作過程上遇到的困難/障礙，你有甚麼提議/方法去改善？

C. Are there any relevant skills which you would like to develop, or knowledge you would like to acquire? 你希望能培訓/發展哪些技能或增進哪些知識？

Have you undertaken any upgrading of job-related knowledge and skills or continuous training/development activities during the period of review, and have these activities fulfilled past year’s continuous training/development target(s)? 在評估的時段中，你有沒有參與提升和工作有關知識及技能的持續培訓/發展活動？這些活動是否達到過去一年的持續培訓/發展目標？
### PART II: Supervisor’s Feedback on Personal Work Attitude, Attributes and Behaviour; Core Competencies; and Service Quality plus One or Two Area(s) where Continuous Training/Development are most needed (Please “√” as appropriate)

第二部份：上司對同事的個人工作態度、素質與行爲表現，工作方面需要的主要個人才能，及服務質素的意見﹝包括一至兩項最需要持續培訓發展的地方﹞﹝請在適當的方格內加“√”﹞

#### Personal Work Attitude, Attributes and Behaviour
個人工作態度、素質與行爲表現

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>Develop Need</th>
<th>Development Need</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Sense of responsibility, dedication and commitment</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
<td>需要發展重點</td>
</tr>
<tr>
<td>2</td>
<td>Service attitude towards customers and/or users</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Cooperation and ability to work as a team member</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Ability to work under pressure, emotional stability, capability of openness</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Self-reflection, initiation, proactiveness and willingness to change</td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

#### Core Competencies
工作方面需要的主要個人才能

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>Develop Need</th>
<th>Development Need</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Job knowledge and skills relevant to the job</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Problem solving skills</td>
<td></td>
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<td>Conceptual skills and Analytical thinking</td>
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<td>6</td>
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<td>7</td>
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### Service Quality

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#### (1) Completes tasks on time/Meets performance pledges
準時完成工作/達到工作表現的承諾

#### (2) Provides consistently thorough and accurate work
工作表現穩定，辦事用心仔細，準確無誤

#### (3) Meets User Requirements/Expectations
工作達至用者的要求/期望

(Please attach additional comments from peers/users, if any)
(如有收集同業/服務使用者的意見，請附上有關文件。)

#### (4) Applies new ideas/innovations to improve work process and/or final product
構思創新的方法來改善工作程序與效果

### Supervisor’s Additional Comments
上司的其他意見
Besides the above evaluation, do you have any other comments/special contribution made by the staff you wish to highlight? 除以上評估外，是否有其他的意見或希望表揚同事曾作出的特別貢獻？
PART III: Supervisor - Staff Dialogue
第三部份：上司與同事對話

A. Next Year’s Plan
明年的計劃

What will be the staff’s key performance targets for next year? 明年同事的主要工作表現指標是哪些？
(Supervisor and the staff should reach mutual agreement in this respect. 上司與同事應在這方面達成協議。)

- ____________________________________________
- ____________________________________________
- ____________________________________________

Please discuss and plan the staff’s continuous training/development target(s) for next year.
請與同事討論及計劃明年的持續培訓/發展目標。

- ____________________________________________
- ____________________________________________

B. Supervisor’s feedback to staff on his/her performance during the meeting:
就同事的工作表現，上司曾於討論時提出以下意見：

C. Staff’s response to supervisor’s evaluation:
同事對上司的評估作出的回應：
(Staff should give his/her response to supervisor’s evaluation during/after the meeting at the earliest convenience. 同事應在面談時或在面談完畢後儘快對上司的評估作出回應。)

Signed by 簽署: ___________________________  _______________

Staff 同事 (Name in block letters 姓名 ) Date 日期

Immediate Supervisor 直屬主管 (Name in block letters 姓名 ) Date 日期

Counter signature with additional comments (if any) 覆核簽署及其他意見(如適用):

Section Head/Head of Office/Head of Department/Dean 支部主管/部門主管/系主任/學院院長 (Name in block letters 姓名 ) Date 日期

EW/CH/SW
Doc: Executive Grade Form (Revised on: 9-1-06, 26-10-07, 6-12-07, 19-3-10, 31-5-11)
Performance Planning and Review Form For Non-Teaching Staff
非教學人員的工作表現計劃及評估表格

FOR MANAGERIAL/SENIOR PROFESSIONAL GRADE STAFF
管理/高級專業人員（廣分職級F及以上）適用

Assessment Period: From __________________ to _____________________
評估時段：________________至

Personal Particulars of Staff 同事個人資料

<table>
<thead>
<tr>
<th>Name</th>
<th>姓名</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff No.</td>
<td>員工編號</td>
</tr>
<tr>
<td>Position</td>
<td>職位</td>
</tr>
<tr>
<td>Dept/Office</td>
<td>部門</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Rating – Score</th>
<th>Definition of Expectations/Standards 等級的標準</th>
</tr>
</thead>
<tbody>
<tr>
<td>A – 5</td>
<td>Delivered expected results on all objectives and exceeded expectations/position requirements with proactive suggestions and innovative methods to help solve problems and improve quality of work of the office; exceptionally dedicated and committed to work; highly efficient, effective and independent in the discharge of duties; can be completely trusted to carry out job to completion. 達到職位的所有要求並超越期望，主動提議創新方法來解決問題及協力改善工作的質素；對工作充滿熱誠；能親自、有效及獨立完成工作，完全可信任能夠妥善完成工作。</td>
</tr>
<tr>
<td>B – 4</td>
<td>Delivered expected results on almost all objectives. Meets almost all expectations/position requirements in an efficient and effective manner. Can be completely trusted to accomplish work requirements independently. 達到職位的絕大部份要求/期望，能快捷有效完成工作, 工作投入積極, 完全可信任能夠獨立妥善完成工作。</td>
</tr>
<tr>
<td>C – 3</td>
<td>Delivered expected results on most objectives. Meets most expectations/position requirements. Dedicated, committed and can usually be trusted to carry out job independently. 達到職位的大部份要求/期望，工作熱誠及在一般情況下可信任能夠獨立妥善完成工作。</td>
</tr>
<tr>
<td>D – 2</td>
<td>Delivered expected results on some objectives in a manner which will require checking and need guidance/coaching to get most of the jobs done. Marginally meets minimum job/position requirements. 達到職位的最低要求/期望；需要別人核對工作及指導完成工作。</td>
</tr>
<tr>
<td>E – 1</td>
<td>Failed to deliver expected results on most objectives. Performance below expectations. Needs constant checking, coaching and guidance to get some of the jobs done. 未能達到職位的大部份要求/期望，需不斷的指導及監督下完成部份工作。</td>
</tr>
</tbody>
</table>

Guidance Notes for Filling Out the Form 填寫時請留意：

1. Please refer to the guidelines and definitions on Performance Indicators inside the “Manual on New Pay and Reward Structure – Performance-based Reward System for Non-teaching Staff” (the Manual) when completing this form. 請參照『新薪酬及福利架構 – 非教學人員工作表現獎勵制度手冊』內的指引與工作表現指標的等級及定義填寫表格。
2. Please put a “✓” in the appropriate box in the form. 請在表格內適當的方格加“✓”。
3. Part I is to be filled out first by the Reviewee. 第一部份先由被評核者填寫。
4. Reviewers should fill out comments on Part I and ratings on Part I and Part II. Please also indicate one or two areas of continuous training/development most needed by the Reviewee for next year. 評核者請填寫第一部份上司的評語和評級及第二部份的評級。再選一至兩項被評核者明年最需要持續培訓發展的地方。
5. Part III should be completed by the Reviewer and Reviewee after discussion. 第三部份應由評核者及評核者經討論後填寫。
### PART I: Staff’s Self-Statement of Past Year’s Work Performance and Supervisor’s Comments

第一部份：同事評述自己過去一年的工作表現及上司的意見

<table>
<thead>
<tr>
<th></th>
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<th>% of Total Workload (100%)</th>
<th>Supervisor’s Comments on Past Year’s Work Performance</th>
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</thead>
<tbody>
<tr>
<td>1.</td>
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</table>

#### B. Are there any areas that you would like to have done better? 你認為在過去一年內哪些方面表現得更好？

Any suggestions/methods for improving the work process to resolve the difficulties/obstacles that you have encountered in your job? 就你在工作過程中遇到的困難/障礙，你有甚麼提議/方法去改善？

#### C. Are there any relevant skills which you would like to develop, or knowledge you would like to acquire? 你希望培訓/發展哪些技能或增進哪些知識？

Have you undertaken any upgrading of job-related knowledge and skills or continuous training/development activities during the period of review, and have these activities fulfilled past year’s continuous training/development target(s)? 在評估的時段中，你有沒有參與提升和工作有關知識及技能的持續培訓/發展活動？這些活動是否達到過去一年的持續培訓/發展目標？

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<table>
<thead>
<tr>
<th>Rating on Part I 第一部份的評級 (50%)</th>
<th>A</th>
<th>B</th>
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</table>
PART II: Supervisor’s Feedback on Personal Work Attitude, Attributes and Behaviour; Core Competencies; and Service Quality plus One or Two Area(s) where Continuous Training/Development are most needed (Please “√” as appropriate)

第二部份：上司對同事的個人工作態度、素質與行爲表現，工作方面需要的主要個人才能，及服務質素的意見（包括一至兩項最需要持續培訓發展的地方）（請在適當的方格內加“√”）

<table>
<thead>
<tr>
<th>Personal Work Attitude, Attributes and Behaviour</th>
<th>A</th>
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<th>D</th>
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<th>Development Need</th>
<th>Development Need</th>
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<tbody>
<tr>
<td>(1) Sense of responsibility, dedication and commitment</td>
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<td>(2) Service attitude towards customers and/or users</td>
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<td>(3) Cooperation and ability to work as a team member</td>
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<td>(4) Ability to work under pressure, emotional stability, capability of openness</td>
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<td>(5) Self-reflection, initiation, proactiveness and willingness to change</td>
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<th>Development Need</th>
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<tr>
<td>(1) Job knowledge and skills relevant to the job</td>
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<td>(5) Conceptual skills and Analytical thinking</td>
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<td>(7) Leadership ability</td>
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<td>Service Quality</td>
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<tr>
<td>(1) Completes tasks on time/Meets performance pledges</td>
<td>準時完成工作/達到工作表現的承諾</td>
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<td>(2) Provides consistently thorough and accurate work</td>
<td>工作表現穩定，辦事用心仔細，準確無誤</td>
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<tr>
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<td>Overall Rating</td>
<td>總評級</td>
<td>(100%)</td>
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<td>C</td>
<td>D</td>
<td>E</td>
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**Supervisor’s Additional Comments**

*上司的其他意見*

*Besides the above evaluation, do you have any other comments/special contribution made by the staff you wish to highlight?*

*除以上評估外，是否有其他的意見或希望表揚同事曾作出的特別貢獻？*
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第三部份：上司與同事對話

A. Next Year’s Plan

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(Supervisor and the staff should reach mutual agreement in this respect. 上司與同事應在這方面達成協議。)

- 
- 
- 

Please discuss and plan the staff’s continuous training/development target(s) for next year.
請與同事討論及計劃明年的持續培訓/發展目標。

- 
- 

B. Supervisor’s feedback to staff on his/her performance during the meeting:

就同事的工作表現，上司曾於討論時提出以下意見：

C. Staff’s response to supervisor’s evaluation:

同事對上司的評估作出的回應：
(Staff should give his/her response to supervisor’s evaluation during/after the meeting at the earliest convenience. 同事應在面談時或在面談完畢後儘快對上司的評估作出回應。)

Signed by 簽署: 

Staff同事 (Name in block letters 姓名) 

Date日期

Immediate Supervisor 直屬主管 (Name in block letters 姓名) 

Date日期

Counter signature with additional comments (if any)
覆核簽署及其他意見(如適用): 

Section Head/Head of Office/Head of Department/Dean 支部主管/部門主管/系主任/學院院長 (Name in block letters 姓名) 

Date日期

EW/CH/SW
Doc: Managerial Grade Form (Revised on: 9-1-06, 26-10-07, 6-12-07, 29-12-10, 31-5-11)
Appendix V
附錄五

Description of Performance Ratings
工作表現等級的描述
Personal Work Attitude, Attributes and Behaviour
個人工作態度、素質與行爲表現

(1) **Sense of responsibility, dedication and commitment**
職責任感，工作積極投入程度

<table>
<thead>
<tr>
<th>A Rating 評級</th>
<th>E</th>
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</thead>
</table>

Can be completely trusted and depended upon to accomplish all tasks independently, shows strong dedication and commitment and is very willing to take on responsibilities to help accomplish the set targets of the Faculty/School/Office.
責任感強，絕少需監督，能獨立完成所有工作；工作積極投入，及非常願意肩負所交付的責任，以達至學院/學系/部門的目標。

Avoids taking responsibility, lacks commitment and dedication when performing assigned task. Always does the least required and always lets others down.
十分懶散，不願承擔責任，在執行被分配的工作時表現消極。只願意做最少的工作，令人失望。

(2) **Service attitude towards customers and/or users**
服務態度，能滿足客戶/服務對象需要的程度

<table>
<thead>
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<th>A Rating 評級</th>
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Has a very good service attitude. Able to establish close contact with users and capable of empathizing with users. Takes initiative to use own knowledge and skills to offer value-added suggestions or services to users. Always delivers prompt services and able to earn the trust and frequent commendation of users.
良好服務態度，能透切了解用者所需及與其保持緊密聯繫；積極應用個人知識及技能為用者提供增值服務及意見，經常提供快捷服務，亦能贏得用者的信任和稱許。

Displays poor service attitude. Always ignores customers’ needs and is indifferent to users’ requests. Frequently engages in dispute with users.
服務態度惡劣。時常忽視用者不同的需要。經常與用者產生爭執。

(3) **Cooperation and ability to work as a team member**
與團隊在工作上合作態度

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<th>A Rating 評級</th>
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A great team player who works towards goals of the team effectively, makes conscientious efforts to ensure the smooth operation of the team.
在團隊中為一位優良的組員，致力達到團隊既定的目標，竭盡所能以確保團隊運作順利。

Has great difficulty in working with people, finds fault with others, is unwilling to compromise and work as a team.
在團隊中與組員相處困難，往往未能與團隊的組員合作。
(4) **Ability to work under pressure, emotional stability, capability of openness**

可以應付工作壓力，情緒穩定，保持開放態度的能力

A Rating 評級 E

Shows an outstanding ability to manage his/her own stress and cope very well with the increasing demand for better work quality.

表現出超卓的才能，能處理壓力及應付不斷提升工作質素的要求。

Is nervous, frequently complains, fails to cope with the increasing demand for better work quality.

經常表現慌張不滿，未能應付不斷提升工作質素的要求。

(5) **Self-reflection, initiation, proactiveness and willingness to change**

自省能力及主動工作態度，願意改變的態度

A Rating 評級 E

Listens to advice and capable of self-reflection, aware of self strengths and weaknesses and self-limitations. Takes initiative to suggest changes and improvements to current processes, can work with change and ambiguity.

樂於接受意見及有自省能力，洞悉個人的優點、缺點及局限。對現行的制度主動提出建議及改善措施，能適應工作環境的改變和不明朗因素。

Easily aroused and reacts very strongly (or with no reactions) to comments/advice. Follows rules and habitual practice in a rigid manner, lacks interest in making improvements and changes.

對他人的意見/忠告反應強烈(或沒有反應)。只懂遵從指示及既定程序，按章工作，沒有主動提出建議及改善措施。

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**Core Competencies - For General Grade Staff**

(Applicable to Bands A, B, C)

主要個人才能 - 一般員工（廣分職級 A, B, C）適用

(1) **Job knowledge and skills relevant to the job**

具備工作所需的知識與技能

A Rating 評級 E

Has excellent job knowledge and skills and thorough understanding of job requirements.

擁有工作所需的豐富知識和技能，亦確切了解工作職位所需。

Does not have adequate knowledge and skills required for the job.

缺乏工作有關的知識及技能。
(2) Problem solving skills
解決問題的能力

A Rating 評級 E

Applies concepts correctly, analyses situation from different angles and solves problems efficiently.
適當地運用概念，以多角度去分析問題及有效率地解決問題。

Avoids problems, unclear about concepts and unable to apply knowledge to solve problems.
迴避問題，對問題欠缺清晰了解，未能運用知識去解決問題。

(3) Communication skills
溝通能力

A Rating 評級 E

Conveys clear and precise messages properly. Information is transmitted accurately and thus increasing the efficiency and effectiveness of work in a team.
清楚和準確地表達想法及提供資料，從而提高團隊的工作效率。

Fails to convey clear and precise messages. Frequent misunderstanding leading to mistakes in work and overall delay of work in progress.
未能清楚及準確地表達想法，經常產生誤解，引致錯誤，從而導致整體工作上的延誤。

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Core Competencies – For Executive/Professional Grade Staff
主要個人才能 - 執行/專業人員（廣分職級 D, E）適用

(1) Job knowledge and skills relevant to the job
具備工作所需的知識與技能

A Rating 評級 E

Has excellent job knowledge and skills and thorough understanding of job requirements.
擁有工作所需的豐富知識和技能，亦確切了解工作職位所需。

Does not have adequate knowledge and skills required for the job.
缺乏工作有關的知識及技能。

(2) Problem solving skills
解決問題的能力

A Rating 評級 E

Applies concepts correctly, analyses situation from different angles and solves problems efficiently.
適當地運用概念，以多角度去分析問題及有效率地解決問題。

Avoids problems, unclear about concepts and unable to apply knowledge to solve problems.
迴避問題，對問題欠缺清晰了解，未能運用知識去解決問題。
(3) Communication/Presentation skills
溝通/表達能力

A Rating 評級 E

Presents ideas logically and clearly. Information is transmitted accurately and thus enhancing efficiency and effectiveness. 能有逻辑及清楚地傳達意見，並提供準確資料，從而提高工作效率。

Difficult to understand. Unable to convey ideas in systematic order, information is transmitted inaccurately and thus leading to inefficiency and ineffectiveness. 難以明白，不能有系統地表達想法，提供錯誤的資料，從而影響工作效率。

(4) Innovation
創新建議

A Rating 評級 E

Is resourceful and offers innovative/ creative ideas to complete tasks, develop alternative recommendations and help improve the procedures, environment and quality of work of the office. 擁有創意或改善工作的能力，提出新意去改善工作程序和環境，並提高質量。

Lacks initiative and interest to offer any suggestion to change, improve/ develop alternatives. 缺乏主動性去改善/解決問題，及提出創新的建議。

(5) Conceptual skills and Analytical thinking
思考技巧與分析能力

A Rating 評級 E

Can critically and thoroughly analyse issues from different perspectives and offers insights and understanding of the most crucial issues. 能從不同角度精密及仔細地分析事件，並能對重要事件掌握理解及洞察能力。

Cannot analyse issues from different angles and fails to see other view points. 未能從不同角度分析事件，亦缺乏提出其他觀點的能力。

(6) Planning and Organizing ability
計劃及組織能力

A Rating 評級 E

Well planned and well organized ahead of time, observes timelines and priorities, manages resources effectively to achieve the overall goals and objectives of tasks/projects. 計劃周詳及精密，並能將資源作有效運用，達到整體工作計劃的目標。

Often lacks planning and organization in performing tasks, mixes up priorities and fails to meet schedules. 工作計劃頻出錯漏，工作次序混亂，並未能如期完成工作。
(7) Leadership ability

領導才能

<table>
<thead>
<tr>
<th>A</th>
<th>Rating 評級</th>
<th>E</th>
</tr>
</thead>
<tbody>
<tr>
<td>Highly effective in motivating others to work with appropriate use of authority and delegation of responsibility. Instructions are clear with adequate coaching and guidance.</td>
<td>Fails to motivate others to work and displays inadequate skills in supervision, coaching and delegation of authority and responsibility.</td>
<td></td>
</tr>
</tbody>
</table>

有領導下屬的能力。能知人善任及適當運用權力分配工作，並給予明確及足夠的指示。

Core Competencies - For Managerial/Senior Professional Grade Staff

主要個人才能 - 管理/高級專業人員（廣分職級 F 及以上）適用

(1) Job knowledge and skills relevant to the job

具備工作所需的知識與技能

<table>
<thead>
<tr>
<th>A</th>
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<th>E</th>
</tr>
</thead>
<tbody>
<tr>
<td>Has excellent job knowledge and skills and thorough understanding of job requirements.</td>
<td>Does not have adequate knowledge and skills required for the job.</td>
<td></td>
</tr>
</tbody>
</table>

擁有工作所需的豐富知識和技能，亦確切了解工作職位所需。

(2) Problem solving skills

解決問題的能力

<table>
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<tr>
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<th>E</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applies concepts correctly, analyses situation from different angles and solves problems efficiently.</td>
<td>Avoids problems, unclear about concepts and unable to apply knowledge to solve problems.</td>
<td></td>
</tr>
</tbody>
</table>

適當地運用概念，以多角度去分析問題及有效率地解決問題。

(3) Communication/Presentation skills

溝通/表達能力

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<th>A</th>
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<th>E</th>
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</thead>
<tbody>
<tr>
<td>Presents ideas logically and clearly. Information is transmitted accurately and thus enhancing efficiency and effectiveness.</td>
<td>Difficult to understand. Unable to convey ideas in systematic order, information is transmitted inaccurately and thus leading to inefficiency and ineffectiveness.</td>
<td></td>
</tr>
</tbody>
</table>

能有邏輯及清楚地傳達意念，並提供準確資料，從而提高工作效率。

難以明白，不能有系統地表達想法，提供錯誤的資料，從而影響工作效率。
(4) **Innovation**

創新建議

*Rating 評級*  

A Is resourceful and offers innovative/creative ideas to complete tasks, develop alternative recommendations and help improve the procedures, environment and quality of work of the office.  

擁有創意或改善工作能力，提出新意去改善工作程序和環境，並提高質素。

E Lacks initiative and interest to offer any suggestion to change, improve/develop alternatives.  

缺乏主動性去改善/解決問題，及提出創新的建議。

(5) **Conceptual skills and Analytical thinking**

思考技巧與分析能力

*Rating 評級*  

A Can critically and thoroughly analyse issues from different perspectives and offers insights and understanding of the most crucial issues.  

能從不同角度精密及仔細地分析事件，並能對重要事件掌握理解及洞察能力。

E Cannot analyse issues from different angles and fails to see other view points.  

未能從不同角度分析事件，亦缺乏提出其他觀點的能力。

(6) **Planning and Organizing ability**

計劃及組織能力

*Rating 評級*  

A Well planned and well organized ahead of time, observes timelines and priorities, manages resources effectively to achieve the overall goals and objectives of tasks/projects.  

計劃周詳及精密，並能將資源作有效運用，達到整體工作計劃的目標。

E Often lacks planning and organization in performing tasks, mixes up priorities and fails to meet schedules.  

工作計劃頻出錯漏，工作次序混亂，並未能如期完成工作。

(7) **Leadership ability**

領導才能

*Rating 評級*  

A Highly effective in motivating others to work with appropriate use of authority and delegation of responsibility. Instructions are clear with adequate coaching and guidance.  

有領導下屬的能力。能知人善任及適當運用權力分配工作，並給予明確及足夠指示。

E Fails to motivate others to work and displays inadequate skills in supervision, coaching and delegation of authority and responsibility.  

沒有領導下屬的能力。未能運用知識去領導別人，及適當將工作和職責分配予其他人。
(8) **Strategic thinking**
**策略性思考能力**

Highly capable of analyzing and making judgments on critical issues which involve complex internal and external factors relevant to the position and development of the University. 擅於對其工作崗位以及與大學發展有關的對內及對外的重要事項上作出分析和判斷。

Fails to grasp the most critical and crucial points of issues and form sound judgment on issues affecting the University. 對那些影響大學的重要事項缺乏了解，以致未能就有關事項作出正確的判斷。

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(9) **Negotiation skills**
**說服能力**

An effective communicator who conveys ideas in a clear, precise and persuasive manner. Negotiates successfully in different situations to arrive at a “win-win” solution, which brings positive results for the University. 是一位出色的談判者，能清楚、準確及有說服力地表達想法。能以高明的談判技巧處理事情，從而達至‘雙贏’局面，為大學帶來正面的結果。

Fails to negotiate and mediate in different situations. 在不同情況下都缺乏商議及調解的能力。

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**Service Quality**
**工作/服務質素**

(1) **Completes tasks on time/Meets performance pledges**
**準時完成工作/達到工作表現的承諾**

Exceptionally quick in completing all tasks, work is well planned and completed according to schedule. 工作異常快捷妥當，按步就班完成工作。經常能達到工作表現的承諾。

Unable to meet deadlines and there are frequent delays. Consistently fails to meet performance targets/performance pledges. 工作時常出現延誤情況，未能在合理時間內完成工作。經未能達到工作表現的指標/承諾。
(2) Provides consistently thorough and accurate work  
工作表現穩定，辦事用心仔細，準確無誤

A Rating 評級 E

Targets are achieved with work that is consistently thorough and accurate.
工作表現非常穩定及準確無誤。

Work is of poor quality. Slow and inaccurate, must be checked constantly and redone very often.
工作表現欠佳，準確度低，工作需經常核對或重新再做。

(3) and (4) are optional. (3) 及 (4) 可選擇性填寫。

(3) Meets User Requirements/Expectations  
工作達至用者的要求/期望

A Rating 評級 E

Provides excellent service to users. Consistently meets user requirements/expectations at an excellent standard.
了解用者所需。所提供的服務經常符合用者的要求/期望。

Consistently fails to meet user requirements/expectations.
未能了解用者所需，未能為用者提供適當的服務，達至用者的要求/期望。

(4) Applies new ideas/innovations to improve work process and/or final product  
構思創新的方法來改善工作程序與效果

A Rating 評級 E

Makes improvements to existing practices/process to enhance overall efficiency and effectiveness of office.
主動建議改善某些工作習慣/程序，以提升整體工作的效率。

Seldom makes any suggestion or action to improve procedures, environment and quality of work.
絕少主動建議及行動以改善工作程序、環境及質素。