|  |  |
| --- | --- |
| **Employee Name (Last, First)** | **Employee ID#** |
|  |  |
| **Job/Classification/Title** | **Department** |
|  |  |
| **Manager/Supervisor Name & Title Review Period (From, To)** | |

|  |  |
| --- | --- |
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| **Review Date** | **Review Type** | | | |
|  | New Hire | Annual | Provisional | Other: |

**Purpose**

The purpose of the Performance Evaluation is to reflect on the employee’s job performance and conduct for the review period and to set goals for the upcoming year. This tool is to be used for interactive and continuous communication between supervisors and employees throughout the year.

**Instructions**

Please complete each section of the form below. For additional information, please see the [Instructions](http://louisville.edu/hr/employeerelations/performance-appraisal) online.

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| **Section 1: Evaluation of Measurement Period** | **Section 2: Plan for Measurement Period** |
| Section 1A: Job Responsibilities  Section 1B: Individual Goals  Section 1C: Professional Conduct  Section 1D: Manager’s Overall Evaluation | Section 2A: Goals for Next Measurement Period  Section 2B: Development Plan |

**Evaluation Levels and Sample Criteria**

|  |  |  |  |
| --- | --- | --- | --- |
| **Exceeding (E)** | **Succeeding (S)** | **Developing (D)** | **Needs Improvement (NI)** |
| Includes individuals who  significantly and  consistently exceed  expectations and role  requirements  Exceeds goals set for the  year  Demonstrates exceptional  depth and breadth of role  knowledge  Demonstrates exemplary  conduct for other  supervisors/staff members  to emulate; highly regarded  by others within the  University community  Exceeds customer’s  expectations on a consistent basis | Includes individuals who  consistently meet and  occasionally exceed  expectations and role  requirements  Meets goals set for the year  Possesses sufficient depth  and breadth of role  knowledge  Exhibits professional  interactions with peers,  customers, managers, and/  or students  Provides accurate and  timely assistance to peers, customers, managers, and/or students on a consistent basis | Includes new employees who are still  learning specific skills or key job responsibilities. Not a reflection on the employee’s skills, but simply a product of time in the position  Needs to gain proficiency in certain  skills, knowledge, processes, speed,  and/or job standards due to new  process  Makes a visible effort to improve. Requires support/direction,  however, performance  demonstrates the ability to  meet expectations  Makes a conscious effort to  demonstrate professional interactions with peers, customers, managers, and/or students  Demonstrates a willingness to learn  from mistakes in order to adapt conduct effectively | Demonstrates inconsistent  required role knowledge  and does not fully perform  all requirements and duties  Meets the minimal  standards for quantity or  quality; often misses  deadlines, work is regularly  incomplete  Takes little to no initiative,  even with prompting  Requires more than the  expected level of  supervision due to lower  quality work required to  complete role successfully  Demonstrates inconsistent  and/or unprofessional  interactions with peers,  customers, managers, and/  or students |
| **Section 1A: Evaluation of Job Responsibilities** | | | |
| Exceeding (E) | Succeeding (S) | Developing (D) | Needs Improvement (NI) |
| *Add comments regarding overall job performance of all job factors for measurement period.* |  | | |
| **Section 1B: Evaluation of Individual Goals** | | | |
| Exceeding (E) | Succeeding (S) | Developing (D) | Needs Improvement (NI) |
| *Add comments regarding achievement of individual goals for measurement period (measurable actions & results).* |  | | |
| **Section 1C: Evaluation of Professional Conduct** | | | |
| Exceeding (E) | Succeeding (S) | Developing (D) | Needs Improvement (NI) |
| *Add comments regarding demonstrated conduct during the measurement period.* |  | | |
| **Section 1D: Manager's Overall Evaluation** | | | |
| Exceeding (E) | Succeeding (S) | Developing (D) | Needs Improvement (NI) |
| *Summarize the employee’s performance, discussing areas of strength & areas for improvement. Provide Overall Evaluation Rating for measurement period.* |  | | |
| ***Employee comments on any aspect of the Performance Evaluation*** |  | | |

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| **Section 2A: Goals for Next Measurement Period** | |
| **Goal** | **Description and Measures** |
|  |  |
|  |  |
|  |  |
| **Section 2B: Development Plan** | |
| **Goal** | **Description and Measures** |
|  |  |
|  |  |
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| --- | --- | --- |
| Yes | No | Have you had the opportunity to complete the Employee Self-Assessment? |
| Yes | No | Do you understand the job factors/goals for the *current* evaluation cycle? |
| Yes | No | Do you understand the job factors/goals for the *next* evaluation cycle? |

**Signatures (Required)**

I have reviewed this Performance Evaluation and Development Plan and have been given the opportunity to provide written feedback. I understand I can grieve an evaluation with an Overall Performance Rating of Needs Improvement. My signature does not imply agreement.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Manager/Supervisor Date |  | Employee Date |  | Second Level Supervisor/Dept. Head Date |