



Performance Management

April 9, 2018



Employee Name: _____ Employee ID#: _____

Job/Classification/Title: _____

Department: _____

Manager/Supervisor Name and Title: _____

Review Period: From _____ To _____

Review Type and Date: New Hire Annual Provisional Other _____ Date _____

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 *(Link).

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)	Learning (L)	Needs Improvement (NI)
<ul style="list-style-type: none"> 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 	<ul style="list-style-type: none"> 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 	<ul style="list-style-type: none"> 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 Requires support/direction, however, performance demonstrates the ability to meet expectations Makes a conscious effort to become a team player Demonstrates a willingness to learn from mistakes/failures in order to adapt conduct effectively 	<ul style="list-style-type: none"> 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**

- E
- S
- L
- NI

Comments regarding overall job performance of all job factors for measurement period

Section 1B: Evaluation of Individual Goals

- E
- S
- L
- NI

Comments regarding achievement of individual goals for measurement period (measurable actions & results)

Section 1C: Evaluation of Professional Conduct

- E
- S
- L
- NI

Comments regarding demonstrated conduct during the measurement period

Section 1D: Manager's Overall Evaluation (Required Section)

- E
- S
- L
- NI

Summarize the employee's performance, discussing areas of strength and areas for improvement. Provide Overall Evaluation Rating for the measurement period.

Employee comments on any aspect of the performance evaluation.

Section 2A: Goals for Next Measurement Period

Goal	Description and Measures
1.	
2.	
3.	

Section 2B: Development Plan

Area for Development	Describe Development Activities
1.	
2.	
3.	

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_____
Employee_____
Second Level Supervisor/Dept. Head_____
Date_____
Date_____
Date



Employee Name: _____ Employee ID#: _____

Job/Classification/Title: _____

Department: _____

Manager/Supervisor Name and Title: _____

Review Period: From _____ To _____

Review Type and Date: New Hire Annual Date _____

Provisional Other _____

Purpose

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Instructions

Please complete each section of the form below. For additional information, please see the Instructions [*\(Link\)](#).

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

Evaluation Levels and Sample Criteria

Exceeding (E)	Succeeding (S)	Learning (L)	Needs Improvement (NI)
<ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • 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 • Requires support/direction, however, performance demonstrates the ability to meet expectations • Makes a conscious effort to become a team player • Demonstrates a willingness to learn from mistakes/failures in order to adapt conduct effectively 	<ul style="list-style-type: none"> • 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

<input type="checkbox"/> E <input type="checkbox"/> S <input type="checkbox"/> L <input type="checkbox"/> NI	Comments regarding overall job performance of all job factors for measurement period
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Section 1B: Evaluation of Individual Goals

<input type="checkbox"/> E <input type="checkbox"/> S <input type="checkbox"/> L <input type="checkbox"/> NI	Comments regarding achievement of individual goals for measurement period (measurable actions & results)
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Section 1C: Evaluation of Professional Conduct

<input type="checkbox"/> E <input type="checkbox"/> S <input type="checkbox"/> L <input type="checkbox"/> NI	Comments regarding demonstrated conduct during the measurement period
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Section 1D: Manager's Overall Evaluation (Required Section)

<input type="checkbox"/> E <input type="checkbox"/> S <input type="checkbox"/> L <input type="checkbox"/> NI	Summarize the employee's performance, discussing areas of strength and areas for improvement. Provide Overall Evaluation Rating for the measurement period.
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Employee comments on any aspect of the performance evaluation.



Section 2A: Goals for Next Measurement Period

Goal	Description and Measures
1.	
2.	
3.	

Section 2B: Development Plan

Area for Development	Describe Development Activities
1.	
2.	
3.	

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

Employee

Second Level Supervisor/Dept. Head

Date

Date

Date



Please complete and return to your supervisor prior to your performance evaluation meeting. Although this form is optional, employees are encouraged to complete the self-assessment to provide their supervisor with valuable information.

Section 1: Employee Information

Employee Name: _____ **Employee ID#:** _____

Supervisor Name: _____

Performance Period: _____ **Date completed:** _____

Section 2: Self-Assessment

Please attach additional pages if necessary when answering the following questions:

1. What were your major achievements in the measurement period?
2. Who are your primary customers and how well have you served them this measurement period?
3. What are the areas of your performance (professional conduct and results) on which you could improve? Please describe.
4. Are there additional skills, knowledge, or resources that would help you more effectively perform your present job or enhance your skill opportunities? If yes, please list.
5. What goals (specific measurable results) do you expect to accomplish during the next measurement period?
6. Did you meet your development plan goals for the measurement period? (Please see prior measurement period's evaluation)

List the subjects you would like to discuss during your annual performance evaluation meeting:



Employee Self-Assessment

- What are your major achievements in the measurement period?
- Who are your primary customers and how well have you served them this measurement period?
- What are the areas of your performance (professional conduct and results) on which you could improve? Please describe.



Employee Self-Assessment

- Are there additional skills, knowledge, or resources that would help you more effectively perform your present job or enhance your skill opportunities? If yes, please list.
- What goals (specific measurable results) do you expect to accomplish during the next measurement period?
- Did you meet your development plan goals for the measurement period? (Please see prior measurement period's evaluation)