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

|  |  |
| --- | --- |
| **Section 1: Evaluation of Measurement Period**  | **Section 2: Plan for Measurement Period** |
| Section 1A: Job ResponsibilitiesSection 1B: Individual GoalsSection 1C: Professional ConductSection 1D: Manager’s Overall Evaluation | Section 2A: Goals for Next Measurement PeriodSection 2B: Development Plan |

**Evaluation Levels and Sample Criteria**

|  |  |  |  |
| --- | --- | --- | --- |
| **Exceeding (E)** | **Succeeding (S)** | **Developing (D)** | **Needs Improvement (NI)** |
| Includes individuals whosignificantly andconsistently exceedexpectations and rolerequirementsExceeds goals set for theyearDemonstrates exceptionaldepth and breadth of roleknowledgeDemonstrates exemplaryconduct for othersupervisors/staff membersto emulate; highly regardedby others within theUniversity communityExceeds customer’sexpectations on a consistent basis | Includes individuals whoconsistently meet andoccasionally exceedexpectations and rolerequirementsMeets goals set for the yearPossesses sufficient depthand breadth of roleknowledgeExhibits professionalinteractions with peers,customers, managers, and/or studentsProvides accurate andtimely assistance to peers, customers, managers, and/or students on a consistent basis | Includes new employees who are stilllearning specific skills or key job responsibilities. Not a reflection on the employee’s skills, but simply a product of time in the positionNeeds to gain proficiency in certain skills, knowledge, processes, speed,and/or job standards due to new processMakes a visible effort to improve. Requires support/direction,however, performancedemonstrates the ability tomeet expectationsMakes a conscious effort todemonstrate professional interactions with peers, customers, managers, and/or studentsDemonstrates a willingness to learnfrom mistakes in order to adapt conduct effectively | Demonstrates inconsistentrequired role knowledgeand does not fully performall requirements and dutiesMeets the minimalstandards for quantity orquality; often missesdeadlines, work is regularlyincompleteTakes little to no initiative,even with promptingRequires more than theexpected level ofsupervision due to lowerquality work required tocomplete role successfullyDemonstrates inconsistentand/or unprofessionalinteractions 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** |
|       |       |
|       |       |
|       |       |

|  |  |  |
| --- | --- | --- |
| [ ]  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 |