

PERFORMANCE EVALUATION FORM FOR EXEMPT STAFF PERSONNEL

Evaluation Period: March 1, 2012, to February 28, 2013

Definition of Performance:

Performance evaluation is defined as the periodic and regular evaluation of an employee's ability to carry out assigned duties and responsibilities. A valuable talent management tool, a performance evaluation enables a supervisor to evaluate the individual's skills and knowledge in carrying out the responsibilities of the job, and allows the employee to see how he or she is achieving results as measured against the work standards set by the supervisor. The general benchmark should be that the employee's overall performance should be at a satisfactory level or greater, after a reasonable period of training and being employed in the position.

Rating Employee Performance:

To assist you with the evaluation process, we have included an evaluation form that lists the employee's major job responsibilities, which are taken directly from the employee's existing position description. Changes that have occurred in the position description should be written on the evaluation form so the duties actually performed by the employee can be evaluated. The official position description on file in University Human Resource Services will be updated upon receipt of the attached form for minor changes. Major changes in job duties and responsibilities may result in a position audit.

Evaluation of General Factors:

Rate the employee's performance using the 5 to 1 rating scale as defined in the "Rating Guide for Performance Measures." Use NA for any factors that are not applicable.

Evaluation of Job Duties and Responsibilities:

While optional, on the left hand side of this section of the evaluation enter the percentage of time spent performing each job duty or responsibility listed, in order of relative importance. Completing the left side of the form does not affect the scoring of the evaluation; however it can be helpful to an employee by outlining his/her job duty priorities.

On the right hand side of the evaluation the supervisor must rate the employee's performance using the 5 to 1 rating scale as defined in the "Rating Guide for Performance Measures."

Scoring the Evaluation:

Using the Excel template entitled "Staff Performance Evaluation Scoring Worksheet" located on the HR Website, calculate the employee's performance evaluation score. Enter data for boxes highlighted in yellow.

1. Enter the score for each general factor rated. For NA ratings enter "0".
2. Enter the total number of general factors that were evaluated. Do not include factors that have an NA = 0 rating.
3. The spreadsheet will calculate the Total Score Average for General Factors.
4. Calculate the number of job duties listed on the evaluation that have the same score.
5. For each performance score rating enter the total number of job duties that received that score (5 to 1).
6. The spreadsheet will calculate the Total Score Average for Job Duties and Responsibilities and the Overall Total Performance Evaluation Score.
7. Print a copy of the worksheet and attach to the employee's performance evaluation.

Scoring Example:

Refer to the HR Website for an example of how to use the Staff Performance Evaluation Scoring Worksheet.

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Evaluation of General Factors

| Performance Rating | Rating Guide for Performance Measures |
|---------------------------|--|
| 5 | Outstanding: This level is awarded only for clearly exceptional performance. Very little if anything could be improved upon. Clear justification with written comments is required for this rating. |
| 4 | Good: Performance is clearly above the satisfactory level. <u>Written comments should be made.</u> |
| 3 | Satisfactory: Performance fully satisfies requirements for this position at the standard level set by supervisor. <u>Written comments should be made.</u> |
| 2 | Needs Improvement: Performance partially satisfies requirements for this position. To become fully effective, improvements are required in this area. <u>Written comments are required for this rating.</u> |
| 1 | Unsatisfactory: Performance did not achieve important requirements. Clear justification <u>with written comments is required for this rating,</u> including a performance improvement plan. |
| NA = 0 | Not Applicable |

Please circle the appropriate rating for each general factor:

Performance Rating

| | Performance | | | | | |
|---|-------------|---|---|---|---|----|
| | 1 | 2 | 3 | 4 | 5 | NA |
| 1. Work Planning | 1 | 2 | 3 | 4 | 5 | NA |
| 2. Work Commitment | 1 | 2 | 3 | 4 | 5 | NA |
| 3. Judgment | 1 | 2 | 3 | 4 | 5 | NA |
| 4. Following Procedures | 1 | 2 | 3 | 4 | 5 | NA |
| 5. Oral Communications | 1 | 2 | 3 | 4 | 5 | NA |
| 6. Written Communications | 1 | 2 | 3 | 4 | 5 | NA |
| 7. Public Contact | 1 | 2 | 3 | 4 | 5 | NA |
| 8. Job Knowledge and Expertise | 1 | 2 | 3 | 4 | 5 | NA |
| 9. Interpersonal Relationships (within the office) | 1 | 2 | 3 | 4 | 5 | NA |
| 10. Punctuality and Attendance | 1 | 2 | 3 | 4 | 5 | NA |

Please use the Staff Performance Evaluation Scoring Worksheet to calculate the general factors score.

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Evaluation of Job Duties and Responsibilities

UHRS lists the main job duties and responsibilities related to this position. Supervisor indicates the Percentage (%) of Time spent performing each job duty or responsibility (optional), and rates the employee for each job responsibility listed. Write comments as requested in the "Rating Guide for Performance Measures."

Percentage of Time (%)

Performance Rating

Sample

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Please use the Staff Performance Evaluation Scoring Worksheet to calculate the job duties and responsibilities score.

Additional Supervisor Comments (optional):

Sample

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Learning and Development

List those training/development opportunities (in or outside of the university) in which the employee has participated since the last performance evaluation.

| |
|--|
| |
|--|

Goals for next Evaluation Period

| Goal | Goal Description |
|------|------------------|
| 1 | |
| 2 | |
| 3 | |

Overall Performance Evaluation Score

Please use the Staff Performance Evaluation Scoring Worksheet to calculate the Total Overall Performance Evaluation Score. Enter the score totals in the grid below.

| | Score |
|---|-------|
| Total Average Score for General Factors | |
| Total Average Score for Job Duties and Responsibilities | |
| Total Overall Performance Evaluation Score | |

Employee:

I certify that this report has been discussed with me, and I understand my signature does not necessarily indicate agreement. I may write a separate response relating to the performance ratings and/or comments stated in this performance evaluation, which will be filed in my employee personnel file located in University Human Resource Services.

Employee's Signature

Date

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Immediate Supervisor's Signature

Date

Next Level Supervision

Date

Next Level Supervision, if applicable

Date

Dean/Administrator reporting to University Officer

Date

Attachments: Check applicable boxes

Staff Performance Evaluation Scoring Worksheet

Employee's Comments (optional)

Evaluator's Comments (optional)

Employee's Performance Improvement Plan (optional)

Return completed form with Scoring Worksheet to University Human Resource Services for inclusion in the employee's personnel file.