



PERFORMANCE REVIEW

For Classified Civil Service
and
Unclassified Staff

Guidelines for Conducting an Effective Performance Review

Prepare yourself and your employee.

- schedule ample time and a private place for the discussion
- notify the employee in advance, in writing
- review documentation (notes, letters, files, etc.) before working on the review
- remember that performance management is a key service to your employees and unit

Make it “priority time.”

- create an agenda for the meeting
- minimize interruptions

Set a tone of collaboration.

- start the discussion on a positive note
- encourage your employee’s participation

Be clear about your purpose.

- reinforce that the discussion will address strengths and areas for improvement

Review performance expectations.

- discuss the position description, units’ reasons for needing the position
- be clear about performance standards within your unit

Discuss performance that is below, meets, and exceeds expectations.

- use language that is clear and specific; use examples
- describe performance, not personality

Ask employee what he/she thinks.

- allow employee to speak freely before responding to his/her comments
- actively listen to your employee
- clarify your employee’s concerns, then address them

Set goals to:

- improve performance in targeted areas
- build on strengths
- develop the employee’s knowledge, skills, and abilities
- align the employee’s work with the needs of the unit

Agree to follow up.

- schedule at least one interim check-in on performance during the year
- ask how your employee prefers to receive feedback (written, verbal)
- discuss how your employee likes to be recognized for good work

Close with encouragement.

- offer your help and support
- end on a positive note by summarizing employee strengths and contributions

Section 1: Employee Information

Employee Name _____

Working Title (if used) _____

Classification _____

Employee ID# _____

Department _____

Department # _____

Appraisal Period From _____ to _____
mo/day/yr mo/day/yr

Type of review:

- Probationary (at the end of the probationary period)
- Interim (as check point during the year, or before the end of probation)
- Annual (at the end of the performance year)

Section 2: Review Employee Performance on University Competencies

Use the following ratings to evaluate performance in each area:

Well Above	Performance is <i>repeatedly above</i> expectations.
Above	performance is <i>sometimes above</i> expectations.
Meets	Performance <i>meets</i> expectations.
Below	Performance is <i>sometimes below</i> expectations.
Well Below	Performance is <i>repeatedly below</i> expectations.

The following performance competencies reflect the University's core values. Each employee is accountable for performance in these areas.

A. Quality Service

- listens carefully and responds to customer requests and problems
- delivers friendly, courteous service to internal and external customers
- demonstrates a commitment to increasing customer satisfaction
- looks for and makes continuous improvements
- performs with accuracy, thoroughness and effectiveness

Describe the employee's performance in this area, using specific examples:

Check one rating for Quality Service:

Well Below Below Meets Above Well Above

If you rated the employee's performance "Below" or "Well Below," how will you and the employee work to improve this?

B. Respect and Community

- establishes and maintains respectful and cooperative working relationships
- demonstrates respect for individuals in all forms of communication
- supports unit and university goals and priorities
- demonstrates respect for a positive, diverse work environment and university community
- handles interpersonal conflicts constructively

Describe the employee's performance in this area, using specific examples:

Check one rating for Respect and Community:

Well Below Below Meets Above Well Above

If you rated the employee's performance "Below" or "Well Below," how will you and the employee work to improve this?

C. Learning and Development

- constructively uses feedback from multiple sources
- seeks new challenges and increased responsibility
- demonstrates willingness to try new approaches
- seeks and participates in learning and development activities

Describe the employee's performance in this area, using specific examples:

Check one rating for Learning and Development:

Well Below Below Meets Above Well Above

If you rated the employee's performance "Below" or "Well Below," how will you and the employee work to improve this?

D. Focus on Results

- sets goals in alignment with unit and university priorities
- organizes work to achieve goals
- identifies and solves problems
- achieves targeted results
- accomplishes a fair and agreed-upon workload
- accepts responsibility for own actions

Describe the employee's performance in this area, using specific examples:

Check one rating for Focus on Results:

Well Below Below Meets Above Well Above

If you rated the employee's performance "Below" or "Well Below," how will you and the employee work to improve this?

E. Job Knowledge

- understands job requirements and responsibilities
- demonstrates ability to perform necessary tasks and procedures
- keeps informed on up-to-date job methods, skills, and techniques

Describe the employee's performance in this area, using specific examples:

Check one rating for Job Knowledge:

Well Below Below Meets Above Well Above

If you rated the employee's performance "Below" or "Well Below," how will you and the employee work to improve this?

F. Job-Specific Competency (optional) _____

The supervisor and employee create a job-specific competency area to supplement the University competencies (A-E above).

Describe the employee's performance in this area, using specific examples:

Check one rating for _____:

Well Below Below Meets Above Well Above

If you rated the employee's performance "Below" or "Well Below," how will you and the employee work to improve this?

G. Performance Management (complete for supervisors only)

- sets clear expectations with staff
- gives feedback in a respectful, constructive way
- encourages staff to seek feedback from multiple sources
- promotes self-development and responsiveness to feedback
- uses coaching skills effectively to improve staff performance
- conducts effective and timely performance reviews
- recognizes excellent performance
- encourages staff to engage in learning and development opportunities

Describe the employee's performance in this area, using specific examples:

Check one rating for Performance Management:

Well Below Below Meets Above Well Above

If you rated the employee's performance "Below" or "Well Below," how will you and the employee work to improve this?

H. Leadership (*complete for supervisors only*)

- builds commitment to mission and priorities of unit and university
- actively involves staff in planning and decision making
- ensures a focus on core performance competencies
- fosters a work environment characterized by mutual respect
- provides direction and defines priorities
- acts with integrity

Describe the employee's performance in this area, using specific examples:

Check one rating for Leadership:

Well Below Below Meets Above Well Above

If you rated the employee's performance "Below" or "Well Below," how will you and the employee work to improve this?

Section 3: Review Goals (*Optional*)

If appropriate, attach a copy of the employee's performance goals for this year. Review and make comments below.

Section 4: Summarize Performance and Make Additional Comments

Check one rating for overall performance:

Well Below

Below

Meets

Above

Well Above

Supervisor's summative or additional comments (*add sheets if needed*):

Employee's comments (*add sheets if needed*):

Section 5: Complete the Employee Professional Development Plan

Write down 1-4 professional development goals and specific action steps to achieve the goals.

Section 6: Signatures and Processing

Sign below and:

1. Give a copy to the employee
2. Place the original in the employee's personnel file

Employee check here:

- My supervisor and I have reviewed this document together.
(Signing the form indicates only that the form has been reviewed with you and that you have received a copy. It does not imply agreement.)

Employee's Signature _____ Date _____

Supervisor's Signature _____ Date _____

This document was reviewed by _____ Date _____
(dean or administrative office signature)

Retention of Performance Review Form:

- **Do not** return a copy of this form to the Office of Human Resources
- You are **required** to retain a copy in the employee's personnel file within your unit.
- Performance review forms **must** be retained for each employee for six years after separation from the University.

For questions or comments, please call the Office of Human Resources, Consulting Services, at 292-2800 to speak to the primary contact person for your area.
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Office of Human Resources
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