



Staff Employee Performance Review

Instructions

Updated 12/21/2020

Instructions for the Staff Employee Performance Review Form

Complete all employee information at top of form.

The reporting period contains the inclusive dates covered by the review. The narrative comments below may only include information about the employee's performance that occurred during the reporting period. The standard annual review dates will be from January 1 through December 31. If the employee was hired after January 1, then the hire date is the "From" date.

University Emphasis

The areas identified in this section are of particular of concern to the University and include for this year:

Compliance Training Completed: A check in the "YES" box indicates that the employee completed the mandatory compliance training for the designated reporting period. A check in the "NO" box indicates that the employee did not complete the mandatory compliance training for the designated reporting period. If the employee did not complete the training, then the employee is ineligible for an annual salary adjustment. The remainder of the evaluation should be completed without regard of the training status unless the reasons for non-completion of the mandatory compliance training are related to other performance areas.

Safety: The answers 'yes' or 'no' in this area do not have a direct bearing on eligibility for an annual salary adjustment. A 'no' answer does call for some explanation/comments in one of the comment boxes of the form as appropriate.

Performance Level (From FSH 3340, section A-10:

A-10. Performance levels in each criterion evaluated are described as follows:

- a. Outstanding* is extraordinary performance well beyond that required for the position. [rev. 7-02]
- b. Exceeds Requirements* represents performance which is better than that expected of a fully competent employee. [rev. 7-02]
- c. Meets Requirements is the performance expected of a fully competent employee and is defined as falling within a broad band of accomplishments ranging between "needs improvement" and "highly competent." [rev. 7-02]
- d. Needs Improvement* denotes performance that is less than that expected of a fully competent employee. It means improvement is necessary. A rating of this type should be thoroughly discussed with the employee.
- e. Unsatisfactory* performance is inferior to the standards for the position. It should be used when an employee clearly fails to perform one or more duties critical to the job and the overall impact of the employee's performance is such that termination of employment is considered and may be implemented. At the minimum, the rating will be thoroughly discussed with the employee.

*Requires executive review and signature. This must be completed prior to discussion or distribution to employee for all ratings other than Meets Requirements

Narrative(s):

General Comments: This section is required for all employees. In this section describe the general performance of the employee as it relates to the job description. Consider commenting on any noteworthy aspect of the quality and quantity of work, such as job knowledge, initiative, dependability, customer service, teamwork, attendance, communications, task management, budget management, safety, decision making, supervision, accountability, civility, judgment, leadership, problem solving, training/development, or other dimensions appropriate for the review.

Comments Supporting “Exceeds Requirements” or “Outstanding” Performance Level: This section is required if either of these two boxes were checked. In this section describe the performance that justifies this characterization. Describe the specific performance.

In addition, this section may be used to mention noteworthy events, projects, or other achievements that happened during the year. These accomplishments may not change the overall performance rating.

Comments Supporting “Unsatisfactory” or “Needs Improvement” Performance Level: This section is required if either of these two boxes were checked. In this section describe the specific performance standards and the behaviors or performance that fail to meet those standards. Remember, the employee is allowed to attach comments (their side of the story) and their comments are the final step in the review process. This is your opportunity to provide a sufficient summary to justify the characterization.

In addition, this section may be used to mention documented situations, performance, or behaviors that happened during the year. These issues may not change the overall performance rating.

Future Expectations/Goals: This section is required for all employees as it can help set the stage for evaluating next year’s performance. The expectations described here will vary widely depending upon the responsibilities of the position. This section may include such things as goals, developmental opportunities, and recommended improvement areas (even if the performance level is rated as satisfactory). For employees rated as “Unsatisfactory” or “Needs Improvement,” needed improvements should be noted in the previous section and do not need to be repeated here.

Signatures:

The supervisor must sign and date before forwarding to the Executive Reviewer and finally to the employee. Forwarding the evaluation should move through each level of supervision, though only the executive reviewer’s signature is required for any performance level outside of “meets requirements”.

The executive reviewer is the appropriate vice president or designee. When the employee’s performance level has been rated as Unsatisfactory or Outstanding, HR strongly encourages the vice president review the evaluation personally. If the executive reviewer questions the rating or the content evaluation, then those issues should be rectified prior to the reviewer’s signature.

After both signatures are completed, the evaluation moves to the employee for review and signature. Do not review with the employee prior to executive reviewer (all performance levels other than “meets”). The employee may attach comments along with their signature. The employee’s signature indicates receipt of the performance review document. It does not indicate agreement or disagreement with the content of the review.

The employee then returns the completed document to the supervisor for placement in the employee’s personnel file.