



# Staff Employee Performance Review

## Instructions

### Instructions for the Staff Employee Performance Review Form

Complete all employee information at the top of the form.

Under evaluation period, enter the inclusive dates covered by the review. The standard annual review dates are January 1 through December 31. If the employee was hired after January 1, enter the date of hire as the “From” date. The narrative comments below may only include information about the employee’s performance that occurred during the reporting period.

### Performance Level (From FSH 3340, section A-10)

Performance levels in each criterion evaluated are described as follows:

- a. Meets/Exceeds Requirements is the performance expected of a fully competent employee and is defined as falling within a broad band of accomplishments ranging between “satisfactory and exceptional” (performance well beyond that required for the position). If an employee is to be considered for merit increase, the comment section should clearly substantiate the meritorious effort from the year and does not mean a merit increase would be given.
- b. Needs Improvement denotes performance that is less than that expected of a fully competent employee and indicates improvement is necessary. It is defined as performance that fails to fully, completely and adequately meet the obligations specified in the employee’s job description or does not meet the expectations set by the employee’s supervisor. It should be used when an employee fails to perform one or more duties critical to the job. A rating of this type should be thoroughly discussed with the employee.

### 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 may be ineligible for an annual salary adjustment as determined annually by leadership. The remainder of the evaluation should be completed without regard to 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.

## 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.

**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 Needs Improvement Performance Level:** This section is required if a Needs Improvement rating is given. 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 "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 the evaluation before forwarding it. If the evaluation is rated **Needs Improvement**, the supervisor will then submit the evaluation form for second-level review. If the evaluation is rated **Meets/Exceeds Expectations**, second-level review is optional. The second-level reviewer is typically the next-level supervisor, but please consult with your unit leadership for specific processes and supervisory signature authority.

**Per the evaluation requirements, a second-level signature is only required for evaluations that receive a "Needs Improvement" rating. While not mandatory, HR strongly encourages the Vice President, Vice Provost, Dean, or Center Officer to personally review evaluations with a "Needs Improvement" rating as part of the second-level review process.** If a second-level reviewer has concerns about the rating or the content of the evaluation, these should be addressed and resolved before obtaining the reviewer's signature.

Once all required signatures are obtained as outlined above, the evaluation is then forwarded to the employee for review and signature. The employee may attach comments along with their signature. The employee's signature indicates receipt of the performance review document but does not signify agreement or disagreement with the content of the review.

The completed evaluation, with all signatures and any attached comments, should be returned to the supervisor for placement in the employee's personnel file with Human Resources.