



## Department PERFORMANCE EVALUATION AND PLANNING

### Guidelines/Instructions

Performance Evaluations and Planning processes provide an opportunity:

- For employees to receive individual feedback from their supervisors.
- To provide an assessment that truly illustrates daily job performance during the specific evaluation period and may vary from the most recent evaluation.
- For evaluators to consider the specific evaluation period and not base the current evaluation on performance prior to this period
- To facilitate communication with an employee about their job related plans and goals for the next evaluation period
- To align the job related needs of the organization with the performance needs of the employee

**Performance Evaluation:** HR recommends using the Job Summary bullet points from the employee's latest Job Description for the Job Activities being reviewed. These should be the major job elements of their position.

Rate each job activity as "Superior," "Exceeds Expectations," "Achieves Expectations," "Needs Improvement" or "Unacceptable." HR recommends comments to support as "Superior," "Exceeds Expectations," "Needs Improvement" or "Unacceptable" ratings. If the rating is "Needs Improvement" or "Unacceptable" then the evaluator's comments must specify corrective actions the employee must take.

#### **Rating Definitions:**

**Superior:** Results consistently exceed performance expectations for the job activity.

**Exceeds Expectations:** Results frequently exceed performance expectations for the task.

**Achieves Expectations:** Results meet performance expectations for the task.

**Needs Improvement:** Results frequently did not meet performance expectations for the task.

**Unacceptable:** Results consistently did not meet performance expectations for the task.

When preparing your job activity "Comment" take time to review the job description essential duties. Speak to these duties in your comments and provide feedback to recognize positive performance along with suggestions for improved performance.

**NOTE:** If the job summary or essential duties are out of date, please contact Human Resources immediately with your changes. This will keep your department's job descriptions current and assist in the annual review process as well as the job posting process should you have a vacancy in this position. You can then feel confident you are seeking the most qualified applicants when you have a job vacancy and you will not waste your valuable time reviewing and making updates to job descriptions when you are ready to hire. This will allow Human Resources to post your job immediately.

A copy of the signed evaluation and associated job description is provided to the employee. The original is filed in the Division personnel files.

**Performance Planning:** For each job activity, the necessary plans for improved performance as well as specific goals to be achieved during the next evaluation period should be stated in the Comment section."

## Performance Evaluation

Employee Name \_\_\_\_\_ Employee No. \_\_\_\_\_ Date of Hire \_\_\_\_\_

Division \_\_\_\_\_ Present Title \_\_\_\_\_ Present Grade/Step \_\_\_\_\_

### Type of Review

- Annual Review                       Interim Review (6 months after hire date or Mid-year)
- 90 Day Review (After "Needs Improvement" or "Unacceptable" Overall Performance Rating)

### Acceptance/Agreement of Plan

This is to acknowledge that, in planning for my subsequent performance evaluation(s), my evaluator and I have discussed my overall job performance as well as my specific job activities and my supervisor's expectations for each of these. I agree to take the corrective actions noted to improve my performance ratings.

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**Training Needs:**

Requested:

Required:

### Employee's Overall Performance:

- Superior    Exceeds Expectations    Achieves Expectations    Needs Improvement    Unacceptable

**Supervisor Comments:**

**Employee's Comments:**

For Overall Performance Ratings of "Needs Improvement" or "Unacceptable":

Scheduled Date for 90 Day Review \_\_\_\_\_

**Employee Name:**

Job Activity:

Review:  Superior  Exceeds Expectations  Achieves Expectations  Needs Improvement  Unacceptable  
Comment:

Job Activity:

Review:  Superior  Exceeds Expectations  Achieves Expectations  Needs Improvement  Unacceptable  
Comment:

Job Activity:

Review:  Superior  Exceeds Expectations  Achieves Expectations  Needs Improvement  Unacceptable  
Comment:

Job Activity:

Review:  Superior  Exceeds Expectations  Achieves Expectations  Needs Improvement  Unacceptable  
Comment:

Job Activity:

Review:  Superior  Exceeds Expectations  Achieves Expectations  Needs Improvement  Unacceptable  
Comment: