

## INSTRUCTIONS FOR THE STAFF PERFORMANCE REVIEW FORM (HRSG/ODT-FOO1-S)

### General Performance Review Preparation

The evaluator completes a draft version of the performance review by assigning a numeric rating to each section as well as an overall performance rating. The rating is based on the outcome of the self-assessment input from the employee's Staff Pre-Performance Worksheet, any supporting documentation, direct observation, and other relevant information obtained during the current review period. In the Comments portion in Section C, provide specific examples to support numeric ratings. The completed performance review form must be reviewed and approved by the evaluator's supervisor **before** the first discussion takes place with the employee.

### Completing the Performance Review Form

Open the Performance Review Form on the Web site, click **Save As** under the **File** menu. Save a copy of the form onto your computer. If you are doing multiple reviews, download an additional copy for each review. Close out of the Web browser before completing the form.

This form is designed for a minimum of one to a maximum of twelve Job Functional Duties/Responsibilities, with the formulas locked to provide convenience in use. However, if you need to add additional space for more Duties/Responsibilities, please call 924-2141 for a separate form.

**Tip:** When listing job functional duties from the position description, it is not necessary to have duties listed in exact terms and specific details. General categories of job functions will suffice. Remember, the position description is attached to the review form for verification of specific details.

**If you have any questions with either the form or the process,  
call Organizational Development and Training at 924-2141 or 2142.**

### Section A – Job Function and Performance Factor Review

1. Type in the Job Functional Duties/Responsibilities from the employee's position description for this review period.
2. Review the rating scale and determine a rating for each job duty (looking at the *results* of employee's efforts) in direct relationship to the demonstrated proficiency in each of the performance factors (looking at *how* the employee accomplished tasks).  
**Note:** If the performance factor is not applicable to that particular job function, you may assign the "N" rating. The formulas take into account any "N" ratings, so an employee's overall rating is not affected negatively when "N" ratings are assigned.
3. Type in the priority weight for each job function. The priority weights for Section A must total 100%.
4. The Job Function Scores for Specific Functional Duties, the Performance Factor Averages, the Weighted Job Function Score, and the Overall Performance Score are calculated automatically.

### Section B – Development Plan for Current Review Period

1. Indicate ending date for current review period. List the goals established for the current review period and indicate the status of each.  
**Note:** If this is a probationary-status employee review, you may not have established goals with the employee. In that case, skip this section and continue on to Section C.
2. Assign a rating to each goal listed, using the performance rating scale.
3. The Score for Section B is calculated automatically.

**Section C – Comments**

1. Provide rationale for each rating of 10 with examples.
2. Type in the employee's strengths.
3. Type in the employee's areas for improvement.

Use this section to cite specific examples that support numeric ratings given in Section A.

**Note:** If additional space is needed, you may attach a separate sheet.

**Section D – Compliance and University Staff Standards**

1. Three areas in Compliance are covered in this section – policy & guidelines / attendance & punctuality / safety
2. Check mark whether employee is meeting or not meeting each area of Compliance.
3. Refer to University Staff Standards
4. Check mark whether employee is meeting or not meeting any staff standards.
5. Type in any of the Compliance or University Staff Standards that are not being met. Indicate the action plan that will be followed and include as goal for next review period.

**Note:** If there are none, leave blank and go to the next section.

**Section E – Development Plan for Next Review Period**

1. Type in goals and the action plans for the next review period.
2. Assign the priority weight that will be given to the Goals Section for the next review period. This priority weight is for all the goals combined.

**Note:** Typically, priority weights are 10-20%; however, the weights may be higher if warranted.

**Section F - Overall Performance Rating**

Section A and Section B scores will automatically appear in this section.

1. Type in the priority weight assigned to Section A (employee's overall job function responsibilities) and the priority weight assigned to Section B (employee's overall goal assignment).  
**Note:** It is recommended that this ratio would typically be 95/5, 90/10, or 80/20 in most cases. However, it is conceivable that there may be a review period where the goal's section priority may take on an additional importance. In that case, the priority weight may be adjusted upwards and **discussed with employee at the beginning of the review period**.
2. The Weighted Score and the Overall Rating will be calculated automatically.
3. Check the box that reflects the employee's Overall Rating.

**Section G – Signatures**

1. A draft version of the Performance Review Form must be reviewed and approved by the evaluator's supervisor **before** the first discussion takes place with the employee.
2. Employee is given up to 5 calendar days to review the draft and provide input, if any, to the evaluator.
3. Employee may waive the option of reviewing for 5 days and consider the draft as the final review. Employee must initial on date for draft discussion if they choose to waive the 5 day draft review. If this option is taken, go to Step 6.
4. The evaluator considers the employee input provided in the 5 day period in preparing the final performance review. If changes to the draft version do occur, new signatures must be obtained from the evaluator's supervisor **prior** to the final discussion with the employee.
5. Final performance discussion takes place with employee and evaluator.
6. Employee signs review and is given copy for their records.