

INSTRUCTIONS FOR THE UNIT 4 STAFF PERFORMANCE EVALUATION FORM (HR/ODT)

General Performance Review Preparation

The evaluator completes a draft version of the performance evaluation 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 B, provide specific examples to support numeric ratings. The completed performance evaluation form must be reviewed and approved by the evaluator's supervisor **before** the first discussion takes place with the employee.

Completing the Performance Evaluation Form

Open the Performance Evaluation 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 evaluations, download an additional copy for each evaluation. 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 evaluation 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 Criteria Evaluation

1. Type in the Job Functional Duties/Responsibilities from the employee's position description and the priority weights assigned 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 criteria (looking at *how* the employee accomplished tasks).
Note: If the performance criterion is not applicable to that particular job function, you may assign the "N" rating. The formulas take into account any "N" ratings so employee's overall rating is not affected negatively when "N" ratings are assigned.
3. The Job Function Scores for Specific Functional Duties, the Performance Criteria Averages, the Weighted Job Function Score, and the Overall Performance Score are calculated automatically.

Section B – Comment

1. Type in comments, citing specific examples to support numeric ratings given in Section A. Provide rationale for any ratings of 10.
Note: If additional space is needed, you may attach a separate sheet.

Section C – Overall Performance Rating

1. The Overall Performance Rating is calculated automatically.
2. Check the box that reflects the employee's Overall Rating.

Section D - Signatures

1. A draft version of the Performance Evaluation Form must be reviewed and approved by the evaluator's supervisor **before** the first discussion with employee takes place.
2. Employee is given up to 14 calendar days to review the draft and provide input, if any, to the evaluator.

3. The evaluator considers the employee input provided in the 14 day period in preparing the final performance evaluation. 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.
4. Employee signs review after final discussion with evaluator has taken place.