**NON-EXEMPT UNIVERSITY STAFF Performance Evaluation Form**

***\*****Supervisors of* ***professional exempt*** *employees may opt to complete the*[*Exempt University Staff Evaluation Narrative Form*](http://www.uwgb.edu/hr/documents/forms/ClassifiedPerformanceReviewExempt.docx) *in lieu of this form.*

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| **Employee Name:** |       |
| **Supervisor Name:** |       |
| **Classification/Title:**  |       |
| **Department:** |       |
| **Date of Evaluation:** |        |
| **Review Period:** |       to        |
| **Evaluation:** | [ ]  3 month [ ]  6 month [ ]  Annual |

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| **PROCEDURE:** |
| [ ]  | 1. | Employee and Supervisor review position description. |
|  |  | [ ]  Position description reviewed, no change  |
|  |  | [ ]  Position description updated (attach signed copy) |
| [ ]  | 2. | Employee completes [R-A-P Worksheet](http://www.uwgb.edu/UWGBCMS/media/hr/forms/RAPSheet.docx?ext=.docx) and submits to supervisor for review. |
| [ ]  | 3. | Supervisor completes Performance Evaluation Form.  |
| [ ]  | 4. | Employee and Supervisor meet to discuss R-A-P Worksheet and Performance Evaluation Form and complete Section D of Performance Evaluation Form (Goal Setting Action Plan). |
| [ ]  | 5. | Employee completes Employee comments section (if desired). |
| [ ]  | 6. | Supervisor and Employee sign off on review. Supervisor sends review to the next level supervisor for review and signature. |
| [ ]  | 7.  | Completed Performance Evaluation Form, including Employee’s R-A-P Worksheet, is forwarded to Human Resources for filing. Supervisor should maintain a copy for departmental records and provide a finalized copy to the Employee. |

**Overall Level of Performance:**

Supervisors are expected to provide an overall rating of the Employee’s level of performance.

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| Employee performance merits eligibility for pay plan increase. |
| [ ] Yes | [ ] No |

*By signing below, I attest that my supervisor has discussed this performance evaluation with me, and I have had the opportunity to respond. (Employee’s signature does not indicate agreement but attests that the Employee has had an opportunity to read and discuss this review with his or her immediate supervisor.)*

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| *Employee Signature* |  | *Date* |
|  |  |  |
| *Supervisor Signature* |  | *Date* |
|  |  |  |
| *Next Level Supervisor Signature* |  | *Date* |
| **SECTION A** |

**Essential Job Functions and Responsibilities**

A position’s essential job functions and responsibilities can be found in the position description. Please list each major function in the numbered boxes below, and indicate the level of performance according to the following scale:

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| **\*Explanation of Ratings Scale** |
| **Exceeds Expectations:** Quality of work exceeds established standards or expectations. Where quantity is a factor, the amount produced is far above what is required or expected. Performance at this level is not typical but achievable. | **Meets Expectations**: Performance fully satisfies the requirements and expectations of the Employee for the job function noted. Goals and objectives, expected results, and/or special assignments are achieved. | **Needs Improvement:** Employee needs to improve on standard(s) established for the job function noted.  Work may be of variable quantity, quality, or inconsistent with standard(s) set for job function.  Goals and objectives are not consistently achieved. | **Unsatisfactory**: Performance consistently fails to meet standard(s) established for the job function noted.  Significant performance improvement and/or correction is necessary. Goals and objectives are not achieved. |

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|  | **Job Function**  |
|  | **Level of Performance:** |
| [ ]  Exceeds Expectations | [ ]  Meets Expectations | [ ]  Needs Improvement | [ ]  Unsatisfactory |
|  | **Identify accomplishments completed during the review period:** |
|  | **Identify areas for further development:**  |

|  |  |
| --- | --- |
|  | **Job Function**  |
|  | **Level of Performance:** |
| [ ]  Exceeds Expectations | [ ]  Meets Expectations | [ ]  Needs Improvement | [ ]  Unsatisfactory |
|  | **Identify accomplishments completed during the review period:** |
|  | **Identify areas for further development:**  |

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|  | **Job Function**  |
|  | **Level of Performance:** |
| [ ]  Exceeds Expectations | [ ]  Meets Expectations | [ ]  Needs Improvement | [ ]  Unsatisfactory |
|  | **Identify accomplishments completed during the review period:** |
|  | **Identify areas for further development:**  |

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|  | **Job Function**  |
|  | **Level of Performance:** |
| [ ]  Exceeds Expectations | [ ]  Meets Expectations | [ ]  Needs Improvement | [ ]  Unsatisfactory |
|  | **Identify accomplishments completed during the review period:** |
|  | **Identify areas for further development:**  |

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|  | **Job Function**  |
|  | **Level of Performance:** |
| [ ]  Exceeds Expectations | [ ]  Meets Expectations | [ ]  Needs Improvement | [ ]  Unsatisfactory |
|  | **Identify accomplishments completed during the review period:** |
|  | **Identify areas for further development:**  |

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|  | **Job Function**  |
|  | **Level of Performance:** |
| [ ]  Exceeds Expectations | [ ]  Meets Expectations | [ ]  Needs Improvement | [ ]  Unsatisfactory |
|  | **Identify accomplishments completed during the review period:** |
|  | **Identify areas for further development:**  |

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| **SECTION B** |

**Additional Performance Factors**

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| **DEPENDABILITY:** Consider the amount of time spent directing this Employee. Does Employee monitor projects, exercise follow-through, and adhere to time frames? Are they on time for meetings and appointments, and do they respond appropriately to instructions and procedures? |
| [ ]  | [ ]  | [ ]  | [ ]  |
| **Exceeds Expectations** | **Meets Expectations** | **Needs Improvement** | **Unacceptable** |
| * Consistently adheres to established time frames.
* Monitors projects independently with minimal supervision.
* Never misses or is late for meetings or appointments.
* Work reflects maximum use of time and resources to surpass expectations.
 | * Usually adheres to time frames.
* Carries through on job duties with routine supervision or follow-up.
* Rarely misses or is late for meetings or appointments.
* Work is usually timely and generally fulfills operational needs.
 | * Adheres to time frames some of the time.
* Requires more than routine supervision.
* Frequently late for meetings and appointments.
* Does not always follow-through on set instructions and procedures.
 | * Seldom adheres to time frames.
* Requires frequent reminders and supervision.
* Often misses or is late for meetings and appointments.
* Resists established work procedures.
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| **Comments:** |

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| **COOPERATION AND TEAMWORK:** How well does Employee work with co-workers and supervisors as a contributing team member? Does the Employee demonstrate consideration of others? Is the Employee able to develop and maintain positive and constructive internal and external relationships? |
| [ ]  | [ ]  | [ ]  | [ ]  |
| **Exceeds Expectations** | **Meets Expectations** | **Needs Improvement** | **Unacceptable** |
| * Consistently encourages and maintains a harmonious/productive work environment.
* Constantly promotes teamwork.
* Is extremely well-respected and trusted by peers.
* Always handles conflict constructively.
 | * Frequently fosters teamwork, cooperation, and positive work relationships.
* Generally well-respected and trusted by peers.
* Avoids disruptive behavior and deals with conflict and frustration appropriately.
 | * Sometimes has difficulty getting along with others.
* Requires occasional reminders regarding needs and sensitivities of others.
* Allows personal bias to affect job relationships.
* Limited ability to deal with conflict appropriately.
 | * Interpersonal relationships are counter-productive to work unit or team functions.
* Is unable to work as a contributing team member.
* Consistently requires reminders regarding needs and sensitivities of others.
* Unable to deal with conflict appropriately.
 |
| **Comments:** |

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| **INITIATIVE:** Consider how well Employee monitors projects independently, seeks solutions to complex problems, and follows through appropriately. |
| [ ]  | [ ]  | [ ]  | [ ]  |
| **Exceeds Expectations** | **Meets Expectations** | **Needs Improvement** | **Unacceptable** |
| * Seeks/applies innovative and relevant techniques.
* Uses opportunities to expand knowledge/skills and shares information with other staff.
* Consistently prevents and resolves unit or team problems.
* May seek greater responsibilities.
 | * Stays current with major changes impacting relevant knowledge or skills.
* Suggests or assists in developing solutions to problems individually or in a team.
 | * Sometimes helps to resolve routine problems.
* At times, demonstrates a lack of motivation in following through on assigned duties or monitoring projects independently.
 | * Seldom takes advantage of available skill enhancement or training opportunities.
* Unable to monitor projects independently.
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| **Comments:** |

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| **ADAPTABILITY:** Consider the ease with which the Employee adjusts to any change in duties, procedures, supervisors, or work environment. How well does the Employee accept new ideas and approaches to work and respond appropriately to constructive criticism and suggestions for work improvement? |
| [ ]  | [ ]  | [ ]  | [ ]  |
| **Exceeds Expectations** | **Meets Expectations** | **Needs Improvement** | **Unacceptable** |
| * Embraces change in duties, procedures, supervisors, or work environment.
* Consistently responds appropriately to constructive criticism, using it to promote effective and innovative changes in work results.
 | * Accepts change in duties, procedures, supervisors, or work environment.
* Usually responds appropriately to constructive criticism.
* Implements suggestions for work improvement.
 | * Occasionally is resistant to changing duties, procedures, supervisors, or work environment.
* Sometimes hesitant to implement suggestions for work improvements or respond effectively to constructive criticism.
 | * Often is resistant to changing duties, procedures, supervisors, or work environment.
* Unable to respond appropriately or effectively to constructive criticism
* Does not welcome suggestions for work improvements.
 |
| **Comments:** |

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| **JUDGMENT:** Consider how well Employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action.  |
| [ ]  | [ ]  | [ ]  | [ ]  |
| **Exceeds Expectations** | **Meets Expectations** | **Needs Improvement** | **Unacceptable** |
| * Consistently resolves problems and promotes improvements.
* Defines and analyzes complex problems.
* Maximizes resources to streamline or improve.
* Shows a high level of logical thinking.
 | * Addresses existing and potential problems.
* Suggests or assists in developing solutions.
* Consistently thinks logically to identify appropriate actions.
 | * Exhibits little initiative in identifying problems, solutions, or improvements.
* At times, uses logical thinking to identify appropriate actions.
 | * Consistently fails to recognize or seek help in resolving routine problems.
* Rarely suggest improvements.
* Does not think logically to identify appropriate actions.
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| **Comments:** |

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| **QUALITY OF SERVICE/COMMUNICATION:** Consider how well Employee communicates with both internal and external campus community. Does the Employee listen, communicate, and respond effectively? Are others treated with respect and courtesy? |
| [ ]  | [ ]  | [ ]  | [ ]  |
| **Exceeds Expectations** | **Meets Expectations** | **Needs Improvement** | **Unacceptable** |
| * Serves as a role model with regard to quality of service.
* Effectively seeks and provides feedback with both internal and external campus community.
* Consistently communicates in a clear, effective, timely, concise, and organized manner.
 | * Adheres to organizational service expectations with few exceptions.
* Usually communicates effectively.
* Listens with understanding.
* Speaks and writes clearly.
 | * Often does not meet organizational service expectations.
* Lacks clarity of expression orally or in writing.
* At times, fails to listen.
 | * Consistently fails to communicate with others effectively or timely.
* Resists organizational service expectations.
* Often fails to listen.
 |
| **Comments:** |

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| **ATTENDANCE:** Consider number and frequency of absences. Consecutive days’ absences should be counted as a single occurrence. Do not include leaves associated with a workers compensation claim, approved Family Medical Leaves (FMLA), pre-scheduled medical/dental appointments, funerals, or family sick leave.  |
| [ ]  | [ ]  | [ ]  | [ ]  |
| **Exceeds Expectations** | **Meets Expectations** | **Needs Improvement** | **Unacceptable** |
| * 0-3 occasions of absence
* Employee is rarely absent and absences are pre-scheduled with appropriate notice to supervisor.
 | * 4-6 occasions of absence
* Employee is absent from time to time, although appropriate notice is provided to supervisor and pattern is not frequent.
* Work is not adversely affected.
* Absences do not adversely impact department operations and/or co-workers.
 | * 7-9 occasions of absence
* Employee is absent a significant amount of time.
* Patterns of leave usage are consistent or recurring.
* Work may be adversely affected.
* Absences have an impact on department operations and/or co-workers.
 | * 9+ occasions of absence
* Employee frequently exhausts accumulated sick leave or uses all annual leave prior to the end of the year.
* Employee has a clearly identifiable pattern of absence.
* Work is adversely affected.
* Absences significantly impact department operations and/or co-workers.
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| **Comments:** |

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| **PUNCTUALITY:** Consider work arrival and departure. Consider the number of unplanned late arrivals/early departures.  |
| [ ]  | [ ]  | [ ]  | [ ]  |
| **Exceeds Expectations** | **Meets Expectations** | **Needs Improvement** | **Unacceptable** |
| * 0-3 occurrences
* Employee is rarely tardy, and notification is provided to supervisor within a reasonable amount of time.
 | * 4-6 occurrences
* Employee is tardy or neglects to follow scheduled work hours from time to time, although appropriate notice is provided to supervisor and pattern is not frequent.
* Work is not adversely affected.
* Punctuality does not adversely impact department operations and/or co-workers.
 | * 7-9 occurrences
* Employee is frequently tardy and neglects to follow scheduled work hours. Employee adjusts work hours without approval.
* Patterns are consistent or recurring.
* Work may be adversely affected.
* Punctuality has an impact on department operations and/or co-workers.
 | * 9+ occurrences
* Employee has a clearly identifiable pattern of tardiness or unplanned/unapproved schedule changes.
* Work is adversely affected.
* Punctuality has a significant impact on department operations and/or co-workers.
 |
| **Comments:** |

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| **SECTION C** |

**dO NOT COMPLETE THIS SECTION FOR PROBATIONARY REVIEWS (3 MONTH, 6 mONTH)**

**Follow up on prior year’s goals**:

The supervisor and Employee together set goals during each review period to: improve in knowledge, skills and/or ability of a particular key job responsibility and identify new goal initiatives for the future. This section is used for follow up on goals set during the prior review periods performance review.

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| **PRIOR YEAR’S GOALS** |
| **Goals, Objectives and Priorities Set During the Last Review Period** (Include Training Objectives): |
| 1.
2.
3.
4.
 |
| **Status of Goals, Objectives and Priorities** (*to be completed by Supervisor and Employee.* Can include notation of accomplishments, progress made, explanation of why goals, objectives, and priorities were not met, plan for accomplishment going forward): |
| 1.
2.
3.
4.
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| **SECTION D** |

**Goal Setting Action Plan**:

The Supervisor and Employee, together, can develop goals for the Employee to improve in knowledge, skills, and/or ability of a particular key job responsibility and identify new goal initiatives for the future. This plan will be evaluated during the next review period for accomplishment and progress. Take into consideration items noted on Employee’s R-A-P Worksheet.

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| **GOALS** |
| **Future Goals, Objectives, and Priorities for Next Performance Period** (Include Training Objectives): |
| 1.
2.
3.
4.
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| **Employee Steps to Accomplish Goals** - Plan Should Utilize **SMART** Goals  (**S**pecific **M**easurable **A**chievable **R**ealistic **T**rackable) |
| 1.
2.
3.
4.
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| **Supervisor Actions to Enable & Support Success of Goal Accomplishment** (Can include providing guidance, coaching, training, finding a mentor, tools, equipment, etc.) |
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| **Supervisor comments:** |
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| **Employee comments:** |
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