**PERFORMANCE EVALUATION NARRATIVE FORM**

Academic Staff/Limited: this evaluation is prepared in accordance with the [UW-Green Bay University and Academic Staff Handbook](https://www.uwgb.edu/UWGBCMS/media/hr/policies/Employee-Handbook-FINAL.pdf?ext=.pdf)  and [SYS 1254, *Performance Management*](https://www.wisconsin.edu/uw-policies/uw-system-administrative-policies/performance-management/) and should address the performance and professional development of the staff person in terms of responsibilities and duties outlined in the letter of appointment and standard job descriptions.

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| --- | --- |
| **Employee Name:** |  |
| **Supervisor Name:** |  |
| **Classification/Title:** |  |
| **Department:** |  |
| **Review Period:** | to |
| **Evaluation:** | 6 month  Annual |

**PROCEDURE:**

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| --- | --- | --- | --- |
|  | Employee and Supervisor review position description. | 5. | Following the meeting, the supervisor sends the review through DocuSign to the employee for signature. |
|  | Position description reviewed, no change |  |
|  | Updated position description attached |  |
|  | Employee completes a Pre-Evaluation Statement as described below, attaches it to this form and returns it to the supervisor. | 6. | Employee acknowledges review and adds comments (if desired) in DocuSign. Manger reviews comments and signs in DocuSign. |
|  | The Supervisor completes an Evaluation Narrative as described below, attaches it to this form, and sets a time for a meeting with the employee.  (Employee must be given a minimum of 2 working days to review the supervisor’s evaluation narrative) | 7. | Completed form is forwarded with all attachments to Human Resources and next level supervisor (if performance rating is ‘not meeting expectations’ through DocuSign. Supervisor should maintain a copy for departmental records and provide the employee a finalized copy. |
|  | Supervisor and employee meet to discuss annual performance and set goals for the coming year. |

**DIRECTIONS FOR THE EMPLOYEE PRE-EVALUATION STATEMENT** Date Completed:

1. **Activities and Accomplishments –** The employee lists their major accomplishments for the evaluation period. The employee should also reflect upon their performance and activities as they relate to the topics below.

* Primary Position Duties and Responsibilities
* Achievement of Pre-established Goals
* Committee Work/Governance Activities
* Research (If applicable to position)
* Professional Development Activities
* Innovations and/or Special Projects
* Community Outreach
* Inclusivity

2. **Goals -** The staff member identifies goals for the coming year which support institutional, divisional, and/or departmental goals and initiatives.

**DIRECTIONS FOR THE SUPERVISOR EVALUATION NARRATIVE:** Date Completed:

Date of Meeting:

1. **Assessment of Performance -** The supervisor evaluates the employee’s performance with respect to the following criteria:

Job Responsibilities (as outlined in position description)

* Quality of work (accuracy, completeness, results)
* Productivity (quantity of work, efficiency)

Organizational Competencies

* Adaptability and Change
* Collaboration and Teamwork
* Communication (written and oral)
* Creativity and Innovation
* Critical Thinking and Problem Solving
* Integrity and Trust
* Responsibility
* Valuing Diversity and Inclusion

2. **Goals and Expectations -** The supervisor discusses and approves the goals for the coming year.

**DIRECTIONS FOR EMPLOYEE RESPONSE: (Optional)**

After the evaluation session and upon receipt of the supervisor evaluation narrative, the employee may choose to attach a brief narrative response to the supervisor's evaluation.

**Overall Level of Performance:**

**\*** Supervisors are expected to provide an overall rating of the employees’ level of performance during the review period and take in to account job responsibilities, organizational competencies and goals. The overall rating should be supported by the observations within the supervisor evaluation narrative. In accordance with [UW-Green Bay’s Compensation and Pay Plan Policy](https://www.uwgb.edu/UWGBCMS/media/policies/files/Comp-and-Pay-Plan-Policy-Final.pdf?ext=.pdf) indication that employee’s overall performance merits eligibility for compensation increase confirms employee has the equivalent of solid or meritorious performance for the duration of the review period.

|  |  |
| --- | --- |
| Employee’s overall performance merits eligibility for compensation increase. | |
| Yes | No |

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| --- | --- | --- |
|  |  |  |
| *Employee Signature* |  | *Date* |
|  |  |  |
| *Supervisor Signature* |  | *Date* |