

## Performance Evaluation Instructions

### 1. Select the form

- Select the correct form based upon the employee's role.
- Non-Supervisor Performance Review Evaluation Form.
- Supervisor Performance Review Evaluation Form— this review contains additional competencies for rating a supervisor.

### 2. Complete information section

- Provisional Reviews – Board of Regent Policy states that all employees should receive a provisional performance evaluation within their first 6 months of employment. This evaluation should be completed no later than month 4 or 5, if there are performance issues.
- Annual Reviews- Board of Regent Policy states that all employees should receive an annual evaluation.
- Other – this review can be used at other times of the year or to follow up on performance improvement plans.

### 3. Ratings

- Ratings are provided in the drop down box to include whole numbers 1 -5 and also quarter increments.

### 4. Comments

- Comments are required in all rating fields and should support the rating. Ensure that all comments are legal.
- If you need assistance with this field, please consult your HR Manager.

### 5. Overall Performance Rating

- If an overall rating falls within the “Unsatisfactory Performance Range”, a Performance Improvement Plan should be created immediately. Prior to the presentation of this plan, consult with your Human Resource Manager.
- If an overall rating falls within the “Performance Needs Improvement”, a Performance Improvement Plan is strongly encouraged to be completed, but Development Needs section must be completed. If you need assistance, contact your Human Resource Manager.

### 6. Development Needs

- This area must be completed if a “Performance Needs Improvement”, but may also be used for an employee at any time.

### 7. Employee Goals

#### a) Previous Year Goals

- Fill in the previous year goals. Supervisors should have copies on these and should reviewing them throughout the year.
- Mark either yes or no if the goal has been completed. Although this is currently not weighted in the ratings, it should be considered when reviewing each competency for an employee.

#### b) Current Year Goals

- Create new goals, ensuring they are SMART goals.  
**S** – (Smart) **M**- (Measurable) **A**- (Achievable) **R**-(Realistic) **T**-(Timely)

## **8. Employee's Professional Goals**

- This section will most likely be completed during the review process. This should be an interactive conversation. Supervisors should always be talking with and developing their employees. This section can help to identify areas that will assist in that process.

## **9. Additional Comments**

- May or may not be used.
- Employees may also submit a written response about the contents of the evaluation to their supervisors within thirty (30) calendar days of receiving their evaluation. Supervisors must submit the copy to HR to be maintained in their employment file along with the evaluation.

## **10. Signatures**

- Once the evaluation form is complete, the Supervisor must sign.
- Supervisor **MUST** obtain next level supervisor signature **PRIOR** to presenting to the employee. Next level supervisor should review prior to signing.
- Employee will have final signature after evaluation is discussed. The employee signature only acknowledges receipt of the evaluation.
- *If an employee refuses to sign, please ask that a same level colleague or above be asked to sign. They do not necessarily need to be a part of the review, but can witness that you have presented the review to the employee and they refuse to sign. Simply hand write, Employee refused to sign and have witness print and sign their name.*

## **11. Copy**

- A copy of the review with all signatures should be provided to the employee.
- Send original copy to HR to be placed in their employment file.

Any additional questions you may have, please contact your HR Manager.