

**IOWA STATE UNIVERSITY**  
OF SCIENCE AND TECHNOLOGY

# IOWA STATE UNIVERSITY P&S EMPLOYEE PERFORMANCE REVIEW

## Guidelines for Conducting an Effective Performance Review

### **Prepare yourself and your employee.**

- schedule ample time and a private place for the discussion
- notify the employee in advance, in writing
- review documentation (notes, letters, files, etc.) before working on the review
- remember that performance management is a key service to your employees and unit

### **Make it “priority time.”**

- create an agenda for the meeting
- minimize interruptions

### **Set a tone of collaboration.**

- start the discussion on a positive note
- encourage your employee’s participation

### **Be clear about your purpose.**

- reinforce that the discussion will address strengths and areas for improvement

### **Review performance expectations.**

- discuss the position expectations, units’ reasons for needing the position
- be clear about performance standards within your unit

### **Discuss performance that is below, meets, and exceeds expectations.**

- use language that is clear and specific; use examples
- describe performance, not personality

### **Ask employee what they think.**

- allow employee to speak freely before responding to their comments
- actively listen to your employee
- clarify your employee’s concerns, then address them

### **Set goals to:**

- improve performance in targeted areas
- build on strengths
- develop the employee’s knowledge, skills, and abilities
- align the employee’s work with the needs of the unit

### **Agree to follow up.**

- schedule at least one interim check-in on performance during the year
- ask how your employee prefers to receive feedback (written, verbal)
- discuss how your employee likes to be recognized for good work

### **Close with encouragement.**

- offer your help and support
- end on a positive note by summarizing employee strengths and contributions

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## Section 1: Employee Information

Employee Name \_\_\_\_\_

Job Title \_\_\_\_\_

Class Code \_\_\_\_\_

University ID# \_\_\_\_\_

Department \_\_\_\_\_

Department # \_\_\_\_\_

Review Period From \_\_\_\_\_ to \_\_\_\_\_  
mo/day/yr mo/day/yr

Type of review – In the Workday system, a general template is provided and titled “P&S Performance Review”. Below are specific performance review types that are recommended for use by HR :

- Three Month (at the end of the first three months of employment)
- Interim (as check point during the year at supervisor’s discretion)
- Annual (at the end of the performance year)

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## Section 2: Review Employee Performance on University Competencies

Use the following ratings to evaluate performance in each area:

<b>Well Above</b>	Performance is <i>repeatedly above</i> expectations.
<b>Above</b>	performance is <i>sometimes above</i> expectations.
<b>Meets</b>	Performance <i>meets</i> expectations.
<b>Below</b>	Performance is <i>sometimes below</i> expectations.
<b>Well Below</b>	Performance is <i>repeatedly below</i> expectations.

Each employee is accountable for performance in the following areas of competency.

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### A. Quality Service

- listens carefully and responds to customer requests and problems
- delivers friendly, courteous service to internal and external customers
- demonstrates a commitment to increasing customer satisfaction
- looks for and makes continuous improvements
- performs with accuracy, thoroughness and effectiveness

Describe the employee's performance in this area, using specific examples:

Circle one rating for Quality Service:

**Well Below      Below      Meets      Above      Well Above**

*If you rated the employee's performance "Below" or "Well Below," how will you and the employee work to improve this?*

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**B. Respect and Community**

- establishes and maintains respectful and cooperative working relationships
- demonstrates respect for individuals in all forms of communication
- supports unit and university goals and priorities
- demonstrates respect for a positive, diverse work environment and university community
- handles interpersonal conflicts constructively

Describe the employee's performance in this area, using specific examples:

Circle one rating for Respect and Community:

**Well Below      Below      Meets      Above      Well Above**

*If you rated the employee's performance "Below" or "Well Below," how will you and the employee work to improve this?*

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**C. Learning and Development**

- constructively uses feedback from multiple sources
- seeks new challenges and increased responsibility
- demonstrates willingness to try new approaches
- seeks and participates in learning and development activities

Describe the employee's performance in this area, using specific examples:

Circle one rating for Learning and Development:

**Well Below                  Below                  Meets                  Above                  Well Above**

*If you rated the employee's performance "Below" or "Well Below," how will you and the employee work to improve this?*

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**D. Focus on Results**

- sets goals in alignment with unit and university priorities
- organizes work to achieve goals
- identifies and solves problems
- achieves targeted results
- accomplishes a fair and agreed-upon workload
- accepts responsibility for own actions

Describe the employee's performance in this area, using specific examples:

Circle one rating for Focus on Results:

**Well Below                  Below                  Meets                  Above                  Well Above**

*If you rated the employee's performance "Below" or "Well Below," how will you and the employee work to improve this?*

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**E. Job Knowledge**

- understands job requirements and responsibilities
- demonstrates ability to perform necessary tasks and procedures
- keeps informed on up-to-date job methods, skills, and techniques

Describe the employee's performance in this area, using specific examples:

Circle one rating for Job Knowledge:

**Well Below      Below      Meets      Above      Well Above**

*If you rated the employee's performance "Below" or "Well Below," how will you and the employee work to improve this?*

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**F. Job-Specific Competency (optional)** \_\_\_\_\_

The supervisor and employee create a job-specific competency area to supplement the University competencies (A-E above).

Describe the employee's performance in this area, using specific examples:

Circle one rating for \_\_\_\_\_:

**Well Below      Below      Meets      Above      Well Above**

*If you rated the employee's performance "Below" or "Well Below," how will you and the employee work to improve this?*

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**G. Performance Management (complete for supervisors only)**

- sets clear expectations with staff
- gives feedback in a respectful, constructive way
- encourages staff to seek feedback from multiple sources
- promotes self-development and responsiveness to feedback
- uses coaching skills effectively to improve staff performance
- conducts effective and timely performance reviews
- recognizes excellent performance
- encourages staff to engage in learning and development opportunities

Describe the employee's performance in this area, using specific examples:

Circle one rating for Performance Management:

**Well Below          Below          Meets          Above          Well Above**

*If you rated the employee's performance "Below" or "Well Below," how will you and the employee work to improve this?*

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**H. Leadership (complete for supervisors only)**

- builds commitment to mission and priorities of unit and university
- actively involves staff in planning and decision making
- ensures a focus on core performance competencies
- fosters a work environment characterized by mutual respect
- provides direction and defines priorities
- acts with integrity

Describe the employee's performance in this area, using specific examples:

Circle one rating for Leadership:

**Well Below          Below          Meets          Above          Well Above**

*If you rated the employee's performance "Below" or "Well Below," how will you and the employee work to improve this?*

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### **Section 3: Review Goals (*Optional*)**

If appropriate, attach a copy of the employee's performance goals for this year. Review and make comments below.

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### **Section 4: Summarize Performance and Make Additional Comments**

Circle one rating for overall performance:

**Well Below**

**Below**

**Meets**

**Above**

**Well Above**

Supervisor's summative or additional comments (*add sheets if needed*):

Employee's comments (*add sheets if needed*):



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## **Section 5: Complete the Employee Professional Development Plan**

Write down 1-4 professional development goals and specific action steps to achieve the goals.

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## **Section 6: Processing**

1. Give a copy to the employee.
2. Keep a copy for the departmental employee personnel file.
3. University Human Resources recommends that you send a copy of the annual evaluation to 3810 Beardshear Hall, where it can be placed in the official personnel file.
4. The P&S acknowledgement of performance review will be completed in Workday.  
Please see the Workday P&S Performance Review User Guide for information on how to complete this portion in the system.

If you have questions, please call the UHR Service Center, 515-294-4800.
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