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
Section 1: Employee Information

Employee Name _______________________________________

Job Title ____________________________________________

Class Code __________________________________________

University ID# _______________________________________

Department __________________________________________

Department # _________________________________________

Review Period From ___________ to ___________ mo/day/yr to 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)

Section 2: Review Employee Performance on University Competencies

Use the following ratings to evaluate performance in each area:

Well Above Performance is repeatedly above expectations.

Above performance is sometimes above expectations.

Meets Performance meets expectations.

Below Performance is sometimes below expectations.

Well Below Performance is repeatedly below expectations.

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

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:

<table>
<thead>
<tr>
<th>Well Below</th>
<th>Below</th>
<th>Meets</th>
<th>Above</th>
<th>Well Above</th>
</tr>
</thead>
</table>

If you rated the employee’s performance “Below” or “Well Below,” how will you and the employee work to improve this?

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:

<table>
<thead>
<tr>
<th>Well Below</th>
<th>Below</th>
<th>Meets</th>
<th>Above</th>
<th>Well Above</th>
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</thead>
</table>

If you rated the employee’s performance “Below” or “Well Below,” how will you and the employee work to improve this?

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:

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<tr>
<th>Well Below</th>
<th>Below</th>
<th>Meets</th>
<th>Above</th>
<th>Well Above</th>
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</thead>
</table>

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

---

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:

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<tr>
<th>Well Below</th>
<th>Below</th>
<th>Meets</th>
<th>Above</th>
<th>Well Above</th>
</tr>
</thead>
</table>

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

---

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:

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<th>Meets</th>
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<th>Well Above</th>
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</table>

If you rated the employee’s performance “Below” or “Well Below,” how will you and the employee work to improve this?

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 _________________________________:

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<th>Well Below</th>
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<th>Meets</th>
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<th>Well Above</th>
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</table>

If you rated the employee’s performance “Below” or “Well Below,” how will you and the employee work to improve this?

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:

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<th>Well Below</th>
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<th>Meets</th>
<th>Above</th>
<th>Well Above</th>
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</table>

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

**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:

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<th>Meets</th>
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<th>Well Above</th>
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</table>

*If you rated the employee’s performance “Below” or “Well Below,” how will you and the employee work to improve this?*
Section 3: Review Goals (*Optional*)

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

Section 4: Summarize Performance and Make Additional Comments

Circle one rating for overall performance:

<table>
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<th>Well Below</th>
<th>Below</th>
<th>Meets</th>
<th>Above</th>
<th>Well Above</th>
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</table>

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

Employee’s comments (*add sheets if needed)*:
Section 5: Complete the Employee Professional Development Plan
Write down 1-4 professional development goals and specific action steps to achieve the goals.

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.