Guide to Conducting Effective Performance Reviews

**Beginning of Evaluation Period**

1. Review job responsibilities/update job description form
2. Review and discuss development plans
3. Supervisor and employee review and agree on performance factors/goals, development and action plans
4. Supervisor provides copy to employee
5. Supervisor keeps on file until end of cycle

**Midway through the Evaluation Period**

1. Solicit input from employee in advance (strongly recommended)
2. Review performance over six months/year
3. Identify and praise accomplishments
4. Identify and discuss gaps and concerns
5. Incorporate employee comments

**End of Evaluation Period**

1. Complete Performance Evaluation Form
2. Hold meeting with employee:
   - Discuss Performance Evaluation Form
   - Set goals for the coming evaluation year (see Beginning of Evaluation Period)
Guide to Completing Performance Evaluation Forms (Non-Exempt/Exempt):

**Non-Exempt** (Do not complete for non-exempt employees hired on or after October 1, 2017.)

1. Complete the top table of information for the employee you are reviewing.
   - Name/Employee ID – The Employee ID can be found on his/her timesheet.
   - Job Title
   - Division (List)
   - Department (List)
   - Supervisor Name
   - Rating Cycle – March 1, 2017 – February 28, 2018
   - Date of Review – should be date the review is scheduled.
   - Section/Unit

2. Skip to page 2 of the form.
   - Evaluate the employee on each performance category using the description of “meets expectations” as a guide.
   - Select the appropriate rating for each performance category and use the space provided to include any special narrative to support the rating.

3. After rating the employee for each performance category:
   - To determine the Overall Score:
     - Decide if an employee “Meets Expectations” or “Does Not Meet Expectations.”
     - If an employee is rated in five or more categories as “meets expectations,” then the Overall Performance Rating would be “Meets Expectations,” and you would put an “X” in “Meets Expectations” box on the signature page.

4. Set goals for the coming evaluation year using the Development Plan. Indicate areas for Improvement/Enhancement if necessary.
5. Record any comments in the space provided on the Development Plan Sheet provided:
   - Complete with any additional comments/narrative.
   - Complete with any comments shared by employee.

6. Hold a feedback session with the employee to discuss his/her performance from the evaluation period.

7. Establish goals for the coming year, and record them in the spaces provided.

8. Obtain all of the signatures on the first page:
   - The employee’s signature
   - Your signature (as the supervisor)
   - Your supervisor’s signature (as the next level supervisor)

**Exempt**  (Must complete for all exempt employees regardless of the date of hire.)

1. Complete the top table of information for the employee you are reviewing.
   - Name/Employee ID – The Employee ID can be found on his/her timesheet.
   - Period Covered – March 1, 2017 - February 28, 2018
   - Job Title/Employment Record # - The Employment Record number can be found on his/her timesheet.
   - Supervisor Name/Supervisor Employee ID
   - Date of Review – should be date the review is scheduled.
   - Division (List)
   - Department (List)
   - Employment Status – put an “x” in the appropriate blank (either Regular or Contingent)

2. Proceed to page 2 of the form for a narrative on the employee’s performance.

3. List the goals from the previous year in the spaces provided.

4. Evaluate the employee’s performance/accomplishment of goals and indicate on the first page if the overall rating is “Meets Expectations” or “Does Not Meet Expectations.”
5. Write a narrative description of the employee’s overall performance for the evaluation period.

6. Record the rating in the box marked either “Meets Expectations” or “Does Not Meet Expectations” for the Overall Performance Rating.

7. Hold a feedback session with the employee to discuss his/her performance from the evaluation period.

8. Establish goals for the coming year and record them in the spaces provided.

9. Obtain all of the signatures on the first page:
   - The employee’s signature
   - Your signature (as the supervisor)
   - Your supervisor’s signature (as the next level supervisor)
# Timetable

## 2018 Information, Dates & Contacts

- **Review period**  
  - March 1 – February 28
- **Performance Reviews/Evaluation Completion**  
  - March 1<sup>st</sup> – April 10<sup>th</sup>  
  - Forms to the OHR via divisional representative by April 30<sup>th</sup>

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<tr>
<th>Executive/Athletics</th>
<th>Administration &amp; Finance</th>
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<td>Cassy Bennett</td>
<td>Carol Wettersten</td>
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<td>Academic Affairs</td>
<td>Innovation &amp; Applied Research</td>
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<td>University Advancement</td>
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<td>Bonnie Lingelbach</td>
<td>Elizabeth Carbone</td>
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