



ITS guide
performance evaluation and planning guidelines

Performance Evaluation and Planning Guidelines

Objectives:

To provide employees adequate feedback about job performance, identify areas of strength, and areas for improvement.

To provide employee and supervisor a structured opportunity to discuss ideas, goals, and direction for job enhancement, growth, and development. Communication should be honest and supportive and build trust.

The performance evaluation process:

- The period used for this evaluation is March 1, 2013 to February 28, 2014.
- Employee completes the Self Report of Accomplishments form and submits it to their respective supervisor via email attachment by **March 14, 2014**.
- Upon careful consideration of employee's performance over the entire rating period as well as the information provided by the employee, supervisor completes *Supervisor Assessment of Performance toward Job Expectations and Job Results* component of the *Employee Assessment and Development Review* form.
- Supervisor discusses the evaluation with the next highest supervisor prior to discussing it with the employee.
- Supervisor then schedules time for meeting with employee.
- Supervisor and employee accomplish two things at evaluation meeting: (1) Discuss employee performance for the previous year and (2) arrive at mutual understanding about goals and development for the coming year.

Guidelines for using the Employee Self-Report of Accomplishments form:

The employee is responsible for completing the form and returning it to their respective supervisor. If the form is not completed and returned by the specified date, the evaluation may be completed without using the Employee Self-Report of Accomplishments form.

To complete the Employee Self-Report of Accomplishments form:

- Access the Employee Self-Report of Accomplishments form at <http://its.unl.edu/hr/staff-resources> under the Annual Evaluation Process
- Download a copy of the blank Employee Self-Report of Accomplishments form to your desktop or other file of your choice.
- Review the current job responsibilities (from your 2012/2013 Evaluation) and make any necessary changes/updates to your 2013/2014 Employee Self-Report of Accomplishments. Include any specific goals/projects that were not included in your job description. Responsibilities listed in Job Expectations should generally be taken from the position description. If the job has evolved so that the position description no longer is an adequate reflection of job responsibilities, the supervisor should work toward mutual understanding with the employee about tasks to be listed for evaluation purposes. The supervisor has ultimate responsibility for outlining job responsibilities.
- Copy the goals section (#4 from 2012/2013 evaluation) to #1 (Goals for this evaluation period).
- Complete #2 and #3 adding any contributions/accomplishments/professional development activities completed during the evaluation period.
- Complete #4 adding goals and professional development activities for the next rating period (2014/2015).
- Complete #5 adding any additional information you feel is relevant to your job performance.
- Submit completed Employee Self-Report of Accomplishments via email attachment to respective supervisor for review and approval.

Guidelines for completing the Supervisor Assessment and Employee Development Review form:

To complete the Supervisor Assessment and Employee Development Review form:

- Access the Supervisor Assessment and Employee Development Review form at <http://its.unl.edu/hr/hiring-and-managing> under the Annual Evaluation Process
- Download a copy of the blank Supervisor Assessment and Employee Development Review form to your desktop or other file of your choice for each employee you supervise.
- Review the job responsibilities submitted by the employee and make any necessary changes/updates. Responsibilities listed in Job Expectations should generally be taken from the position description. If the job has evolved so that the position description no longer is an adequate reflection of job responsibilities, the supervisor should work toward mutual understanding with the employee about tasks to be listed for evaluation purposes. The supervisor has ultimate responsibility for outlining job responsibilities.
- Copy and paste the Job Expectations and Expected Outcomes from the Employee Self-Report to the Supervisor Assessment for each employee.
- Complete the ratings for job responsibilities or expectations by selecting the appropriate rating (i.e. Unsatisfactory Performance, Needs Improvement, Meets Expectations or Exceeds Expectations). Comments should cite specific examples and/or objective and observable evidence to support the ratings given.
- Rating definitions - -
 - Unsatisfactory Performance** – Seldom meets established standards; must improve for continued employment
 - Needs Improvement** – Sometimes meets established standards but lack consistency; seldom exceeds and often falls short of desired results; must improve for continued employment
 - Meets Expectations** – Meets and occasionally exceeds established standards
 - Exceeds Expectations** – Consistently meets and almost always exceeds expected levels of performance
- Complete the ratings for job competencies and key behaviors (i.e. Unsatisfactory Performance, Needs Improvement, Meets Expectations or Exceeds Expectations). Comments should cite specific examples and/or objective and observable evidence to support the ratings given.
- Rating definitions - -
 - Unsatisfactory Performance** – Seldom meets established standards; must improve for continued employment
 - Needs Improvement** – Sometimes meets established standards but lack consistency; seldom exceeds and often falls short of desired results; must improve for continued employment
 - Meets Expectations** – Meets and occasionally exceeds established standards
 - Exceeds Expectations** – Consistently meets and almost always exceeds expected levels of performance
- Ratings of **Unsatisfactory Performance** or **Needs Improvement** are considered unsatisfactory; these ratings should be accompanied with specific comments about how performance should improve. Strong consideration should be given to taking steps to assist the employee in meeting expectations. Such steps could include a special evaluation in three months and/or taking corrective action to address performance deficiencies.
- Goals for the next (future) evaluation period should be determined with the input of the employee. Goals should be reviewed periodically throughout the rating period so they continue to reflect priorities assigned to the employee. Any areas in which performance expectations are not being met should be noted and a plan made for improvement.
- Provide an overall assessment rating of the employee. Comments should cite specific examples and/or objective and observable evidence to support the ratings given.
- Supervisor discusses the evaluation with the next highest supervisor prior to discussing it with the employee.
- Supervisor then schedules time for meeting with employee.
- Supervisor and employee accomplish two things at evaluation meeting: (1) Discuss employee performance for the previous year and (2) arrive at mutual understanding about goals and development for the coming year.
- Signed evaluations should be returned to Lisa Vogt no later than **May 2, 2014**.