

## **Instructions for Completing the Performance Evaluation Form**

### Purpose of the form

The Performance Evaluation form is designed as a tool for supervisors and employees to utilize in measuring an employee's individual performance. The form should initiate open communication regarding the setting and attaining of performance goals.

### First page of the form

The first page of the Performance Evaluation form is intended to gather general job information about the employee. The type of evaluation being conducted should be selected from among the four options, which are defined within the form. Additionally, the first page of the form details the rating scale and defines each particular rating for future use within the form.

### Performance Factors/Job Responsibilities section

The Performance Factors and Job Responsibilities section of the form is designed to measure the employee's individual performance in several key areas. It is essential to create a mutual understanding concerning the duties and responsibilities of the employee's job and of the performance objectives. There are ten performance factors and each one is considered a fundamental responsibility of any job within the University. The supervisor should consider the employee's performance in regards to each performance factor and select an applicable rating based on the previously described rating scale. Additionally, under the Comments/Expectations heading, the supervisor should provide specific comments regarding the employee's performance so that the employee understands the reason for the rating. The comments and expectations should give praise where it is due, give criticism or suggestions where it is necessary, update the employee of their progression in attaining the performance goals, inform the employee of any problems that may have arisen in their job, and notify the employee of what is expected of them in the future.

### Supervisory Performance Factors section

The Supervisory Performance Factors section should only be completed if the employee being evaluated supervises other employees as a function of their daily job responsibilities. This section is designed to measure the employee's performance in four areas which are considered fundamental responsibilities of any supervisory job within the University. Once again, the supervisor should consider the employee's performance in each area and select an applicable rating. The supervisor should also provide specific comments and expectations to the employee for each performance factor.

### Last page of the form

In the Overall Performance Rating section, the supervisor should select a final rating for the employee's overall job performance. The overall performance rating should reflect the employee's performance as a whole during the evaluation period. The supervisor should take into consideration the ratings of each performance factor, as well as the employee's performance in any other key areas specific to the employee's particular job. The information provided in the performance evaluation form and the overall performance rating may be used to aid supervisors in making personnel decisions in the future. If the employee's overall performance rating is

Below Satisfactory or Unsatisfactory, the supervisor should consult Human Resources in order to develop a plan of action for improving the employee's future performance in the job.

Under the Major Strengths heading, the supervisor should list any factors, tasks, skills, or areas in which the employee has particularly excelled. The supervisor should also describe any ways in which the employee could continue to use those strengths effectively. The supervisor should then list any factors, tasks, skills, or areas in which the employee could use improvement. The supervisor should also describe the ways in which the employee can achieve improvement. This section can be utilized by the supervisor to establish the employee's performance goals for the next evaluation period.

After completion of the form, the supervisor should sign the form. After the supervisor has discussed the performance evaluation with the employee, the employee should sign the form and be given an opportunity to record any comments regarding the content of the performance evaluation form. The employee should be encouraged to include their own comments regarding their performance, but the inclusion of employee comments is entirely voluntary.

#### Additional Information

Employees have the right to appeal an evaluation with which they do not agree. The appeals process should follow the Grievance Procedure outlined in Section 9 of the Troy University Staff Handbook.

Prior to completing and conducting employee performance evaluations, supervisors should consult the Management Tips for Performance Evaluations document available on the Human Resources website. This document will provide a great deal of helpful information on how to properly evaluate employees' performance and how to properly discuss the performance evaluations with employees.