

## Performance Evaluation Tips

1. **Be prepared:** Know the objectives and goals of the meeting.
2. **Time and Place:** Choose a quiet, private spot with as few interruptions as possible.
3. **Conducting the review:**
  - a. Create a positive environment and help the employee feel at ease.
  - b. Give balanced feedback, both strengths and areas of improvement, starting with the strengths.
  - c. Focus on the job duties, not the person.
  - d. Ask questions and allow the employee to provide feedback.
  - e. When discussing areas for improvement, discuss methods and objectives for improving.
  - f. Discuss possibilities for career growth, the employee's aspirations and professional development necessary to be a candidate for future positions.
4. **Conclusion:**
  - a. Summarize and review the important points of the discussion.
  - b. Restate action steps that have been recommended and provide a time frame for completion.
  - c. Make sure employee reviews the appraisal and provides comments.
  - d. Have employee sign or acknowledge that he or she has read it (does not signify agreement with the content).
5. **Follow-up:**
  - a. Follow-up with the employee to see how plans are proceeding within the given time frames.
  - b. Offer the employee assistance in achieving objectives and encourage discussion of successes and obstacles.

### Assigning an Overall Rating

Rating	Description	Examples
<p><b>Needs Improvement</b></p> <p><i>Performance does not meet objectives. Employee needs coaching and is not performing up to standards.</i></p>	<ul style="list-style-type: none"> <li>• Performs a few or some of the essential functions</li> <li>• Inconsistently reports to work on time.</li> <li>• Not able to effectively respond to or resolve customer or departmental issues.</li> <li>• Does not seek out developmental opportunities.</li> <li>• Does not participate in the performance management and development process.</li> </ul>	<ul style="list-style-type: none"> <li>• Lacks professionalism (dresses inappropriately, uses inappropriate language, and participates in too much side conversation).</li> <li>• Employee doesn't respond to e-mails or voice mails in a reasonable time frame and often doesn't respond at all.</li> <li>• Employee often "forgets" to complete assigned tasks.</li> <li>• Employee doesn't greet and/or acknowledge customers.</li> <li>• Employee hasn't responded positively to coaching and/or development activities.</li> </ul>
<p><b>Meets Objectives:</b></p> <p><i>Performance regularly meets expectations of established objectives. Employee may exceed some, but not the majority of objectives.</i></p>	<ul style="list-style-type: none"> <li>• Performs essential functions Reports to work regularly and on time.</li> <li>• Consistently provides excellent customer service to all internal and/or external customers/clients/patients and resolves issues and/or complaints.</li> <li>• Seeks out developmental opportunities.</li> <li>• Participates in the performance management and development process.</li> </ul>	<ul style="list-style-type: none"> <li>• Employee responds to e-mails and phone calls daily and escalates issues as appropriate.</li> <li>• Employee completes all assigned tasks even if tasks aren't normally their direct responsibility.</li> <li>• Employee provides excellent customer service to all and treats everyone respectfully.</li> </ul>
<p><b>Exceeds Objectives</b></p> <p><i>Performance always meets and generally exceeds established objectives.</i></p>	<ul style="list-style-type: none"> <li>• Displays <u>exemplary</u> performance and performs all essential functions, <u>consistently exceeding</u> expectations by going above and beyond.</li> <li>• <u>Always</u> volunteers to absorb additional work and assist others when necessary.</li> <li>• <u>Always</u> provides exceptional customer service to all internal and/or external customers/clients/patients and proactively resolves issues and/or complaints.</li> <li>• Seeks out developmental opportunities and volunteers to <u>lead</u> projects.</li> <li>• Takes ownership of personal development and <u>actively</u> participates in the performance management and/or development process.</li> <li>• Is ready to take on additional responsibilities, more complex assignments and/or projects.</li> </ul>	<ul style="list-style-type: none"> <li>• Employee often initiates improved process changes even if they don't "own" the process currently.</li> <li>• Employee actively seeks out opportunities to take on more complex assignments and/or projects.</li> <li>• Employee initiates a new process that provides the university with an enhancement or savings.</li> </ul>