



**EMPLOYEE PERFORMANCE EVALUATION AND DEVELOPMENT PLAN
FOR NOT-IN-UNIT NONEXEMPT EMPLOYEES**

Employee's Name	
Title	
Department	
Division	
Length of time in position	

Evaluator's Name	
Title	
Date	

PART 1 – PERFORMANCE EVALUATION

Directions: Check the rating that best reflects the employee’s performance for the given Performance Factors.

RATING CATEGORIES

- Outstanding (4):** Employee is exceptional in all areas of responsibility. Performance significantly exceeds standards and expectations and can be considered a model for the department. Performance at this level is rare and would generally be recognized by peers, immediate supervisor, management, and others. This individual suggests and initiates improvements/changes and through his/her own performance has materially enhanced effectiveness of the department or work area. Performance is generally not equaled by others. For employee evaluations to retain credibility, supervisors should use this rating sparingly.
- Very Good (3):** Employee exceeds most position requirements. Performance at this level consistently exceeds standards and expectations and would generally be recognized by peers and immediate supervisor. Performance is characterized by notable skill, initiative and superior job knowledge. This individual’s performance exceeds most other employees in the same or similar position.
- Good (2):** Employee consistently meets performance standards. The individual performing at this level is considered a fully competent, stable and skilled performer by co-workers and immediate supervisor. Employee may occasionally exceed job performance standards and expectations. This level of performance is what would generally be expected from most competent, experienced employees.
- Fair (1)** Employee meets some performance standards but is deficient in others. Performance does not consistently meet acceptable levels in all areas. Overall performance only meets the minimum standards and expectations. The need for further development and/or improvement is clearly recognized and expected. Performance at this level may cause the department and/or co-workers some problems or inconveniences, or tends to diminish the department’s effectiveness and/or productivity. Performance at this level is characterized as “just getting by”. Employees with an overall performance rating of Fair will be put on notice that the next 1 year performance appraisal must show an overall improvement to Good. No improvement will be grounds for disciplinary action that may lead to termination. Coaching and/or additional training by the supervisor are required.
- Unsatisfactory (0):** Employee’s performance is consistently unacceptable. It is inadequate and below minimum acceptable standards and expectations. There is considerable room for improvement. Performance is causing problems/inconveniences/hardships for the department and/or co-workers and is having a negative impact on departmental effectiveness and/or productivity. This level of performance cannot be condoned or allowed to continue. A continued overall performance rating of Unsatisfactory at the time of the next Interim Performance Review will be grounds for disciplinary action that may lead to termination.
- Not Applicable (N/A):** Employee does not have an opportunity to use this skill.

Performance Factors	4	3	2	1	0	N/A	Supporting Details
Quality of Work Extent to which the employee's work is accurate, thorough and neat.							
Quantity of Work Extent to which the employee produces the expected volume of work within a specified timeframe.							
Occupational Knowledge Extent to which the employee has the practical/technical knowledge required for this position.							
Reliability Extent to which the employee can be relied upon to complete a task and follow up.							
Independent Thinking/Judgment Extent to which the employee can work with little or no supervision. Extent to which an employee demonstrates sound judgment and decision-making skills, when necessary.							
Creativity/Resourcefulness Extent to which the employee applies creativity within the scope of his or her position. Includes creative problem solving, looking for more efficient ways to perform tasks, and using available resources in new ways.							
Initiative/Self-Development Extent to which the employee seeks out new assignments or opportunities to develop additional skills.							

Performance Factors	4	3	2	1	0	N/A	Supporting Details
Policy Adherence Extent to which the employee follows campus regulations and policies as they are articulated in the employee handbook.							
Interpersonal Interactions Extent to which the employee cooperates and communicates with internal/external customers. Extent to which the employee builds positive, non-discriminatory working relationships with others. Extent to which an employee is a team player.							
Flexibility/Adaptability Extent to which the employee can deal with changes and shift projects in order to manage changing priorities. Ability to develop and apply new skills.							

(Supporting Details boxes will only accommodate a limited amount of text. Attach additional sheets if necessary.)

Check the Overall Rating of Employee's Performance	
<input type="checkbox"/> Outstanding	80% of performance factors rated 4 with none below 2
<input type="checkbox"/> Very Good	80% of performance factors rated 3 or better with none below 2
<input type="checkbox"/> Good	80% of performance factors rated 2 or better with none below 1
<input type="checkbox"/> Fair	80% of performance factors rated 1 or better
<input type="checkbox"/> Unsatisfactory	80% of performance factors rated 0

Calculation of Overall Rating

There is a total of 10 Performance Rating Factors that can be used. However, employees may not have an opportunity to use all of these skills/competencies in the performance of their job. Those Performance Rating Factors should have been indicated as N/A (not applicable), since they are not a responsibility of this employee's position. To manually calculate the Overall Rating, count only the number of Performance Factors that were actually used, and refer to the chart below for 80% of that number. If this form is completed online, the Overall Rating will be automatically calculated.

Number of Performance Rating Factors Use	80%
10	8.0
9	7.2
8	6.4
7	5.6
6	4.8
5	4.0
4	3.2
3	2.4

Number of Performance Factors used: _____ 80% Rounded to _____ Discretionary Rounding Box

Rated as 4: _____

Rated as 3: _____

Rated as 2: _____

Rated as 1: _____

Rated as 0: _____

If 80% of the Performance Factors are rated as 4 with none below 2, the overall rating is **Outstanding**.

If 80% of the Performance Factors are rated as 3 or better, with none below 2, the overall rating is **Very Good**.

If 80% of the Performance Factors are rated as 2 or better, with none below 1, the overall rating is **Good**.

If 80% of the Performance Factors are rated as 1 or better the overall rating is **Fair**.

If 80% of the Performance Factors are rated as 0 the overall rating is **Unsatisfactory**.

In most cases 80% of the Performance Factors that were used will not be equal to an integer. Where fractions are involved (i.e., .2, .4, .6, .8), the supervisor is expected to utilize judgment, discretion and fairness in determining the Overall Rating based on how strongly the employee's performance leans towards the higher or lower rating. Checking the Discretionary Rounding Box will automatically adjust the rounding and recalculate the Overall Rating.

Supervisors must conduct a mid-year Interim Performance Evaluation for employees receiving an overall performance rating of Fair or Unsatisfactory. Supervisors may also choose to use the Interim Evaluation for employees with an overall performance rating of Good or better for mentoring/coaching, to review progress being made on goals, or to evaluate performance mid-way through the year or more frequently, if they feel it is needed for certain Performance Factors.

PART 2 – EMPLOYEE DEVELOPMENT PLAN FOR UPCOMING YEAR

(Boxes below will only accommodate a limited amount of text. Attach additional sheets if necessary.)

Goals for Upcoming Year for Performance Factors Rated 1 or 0 (optional for Factors rated 2 and above)

	Performance Factor(s) Targeted	Goal	Target Date
1.			
2.			
3.			

Recommendations for Employee Development or Skills (courses, workshops, new assignments, apprenticeship, etc.)

	Development Areas	Target Date
1.		
2.		
3.		

Additional Comments by Supervisor (accomplishments, successful projects, overall contribution, etc.)

Additional Comments by Employee

Will an Interim Performance Evaluation be completed? Yes No

(Supervisors must calendar a 6-month evaluation for employees receiving an overall performance rating of Fair or Unsatisfactory.)

Employee signature _____ Date _____

Supervisor signature _____ Date _____

Senior Staff approval _____ Date _____