4 KEY STEPS TO ACHIEVE A SUCCESSFUL

Performance Evaluation

Human Resources

01

Plan & Prepare

Schedule uninterrupted time to meet with the employee in-person or virtually. Be sure to review the employee's record of performance before the meeting by looking over the:

- employee's self-assessment,
- any kudos and/or any write-ups they've received, and
- feedback provided throughout the year to the employee

02

Encourage a Two-Way Conversation

Engage the employee in the discussion. Make sure the employee understands what they've heard and give them space to respond and ask questions. Then, provide clarifty, if necessary.

03

Review & Assess Goal Completion

Review and assess if your employee met the listed goals:

- Rate goals based on actual results; use tangible examples.
- Identify strengths, weaknesses, and any performance gaps and tie to Institute performance competencies.

04

Determine Performance Rating

Determine overall performance rating based on the individual competency ratings.

- Rate based on the review period only.
- Review the ratings for each competency and give specific examples for the rating.
- Review resources to improve or enhance performance.

Applying the Ratings

EXCEPTIONAL

- Both what is produced and how it is produced far exceeds expectations of the position.
- The employee is often sought out by others for counsel and assistance and is widely recognized as a role model. Examples of the results and sought-after expertise must be given to receive this rating.
- This rating should be rarely granted and reserved for truly outstanding consistent performance throughout the review period.

STRONG

- Both what is produced and how it is produced meet and often exceeds expectations of the position.
- Results add value beyond the scope of the current role, often benefiting the division/department. Examples of these results must be given to receive this rating.
- This rating should be reserved for employees with consistent commendable performance.

MEETS EXPECTATIONS

- Both what is produced and how it is produced meets expectations of the position.
- The employee is a dependable, competent, knowledgeable individual who meets and occasionally exceeds expectations of the position.
- This rating conveys solid, consistent effective performance.

NEEDS IMPROVEMENT

- Either what is produced or how it is produced requires improvement in one or more areas to meet expectations of the position.
- Such performance shortfalls may be attributable to newness on the job, missing or undeveloped skills, and/or experience. Regardless, the rating conveys that performance is below expectations in one or more areas and must be improved.
- A performance improvement plan and review by unit HR Representative and Employee Relations is required.

UNSATISFACTORY

- Both what is produced and how it is produced are below expectations and clearly unacceptable.
- Unless there is immediate and sustained improvement, progressive disciplinary action may need to occur.
- A performance improvement plan and review by unit HR and Employee Relations is required.