**UNIVERSITY OF WISCONSIN-WHITEWATER**

**EMPLOYEE PERFORMANCE & DEVELOPMENT REVIEW**

EMPLOYEE NAME:

CLASSIFICATION:

DEPARTMENT:

SUPERVISOR:

PERIOD OF REVIEW: TO

TYPE OF REVIEW: [ ]  Probationary or [ ]  Permanent

**INSTRUCTIONS TO RATER**

Listed below is a rating scale guide for seven performance factors and seven behavioral traits that are important in the performance of the employee’s job. The “overall performance” evaluation should reflect employee’s total performance, including performance factors as related to employee’s responsibilities and duties as set forth in the job description and behavioral traits.

|  |  |
| --- | --- |
| **DISTRIBUTION****INSTRUCTIONS** | 1. Departments maintain original for departmental records.2. Distribute one copy to the employee.3. Distribute one copy to Human Resources & Diversity. |

|  |  |
| --- | --- |
| **MARKING****INSTRUCTIONS** | The supervisor should indicate the employee’s performance by using the ***check box*** next to the appropriate level of performance. |

The following rating scale guide is provided to assist the evaluator in assigning the most appropriate measurement of employee’s performance factors and behavioral traits.

1 = **UNACCEPTABLE** – Consistently fails to meet job requirements; performance clearly below minimum requirements. Immediate improvement required to maintain employment.

2 = **NEEDS IMPROVEMENT** – Occasionally fails to meet job requirements; performance must improve to meet expectations of position.

3 = **MEETS EXPECTATIONS** – Able to perform 100% of job duties satisfactorily. Normal guidance and supervision are required.

4 = **EXCEEDS EXPECTATIONS** – Frequently exceeds job requirements; all planned objectives were achieved above established standards and accomplishments were made in unexpected areas as well.

5 = **SUPERIOR** – Consistently exceeds job requirements; this is the highest level of performance that can be attained.

**PART I – PERFORMANCE FACTORS**

1. Knowledge, Skills, Abilities – Consider the degree to which employee exhibits the required level of job knowledge and/or skills to perform the job and this employee’s use of established techniques, materials and equipment as they relate to performance.

 Unacceptable………………………………………………………………………….Superior N/A

[ ] 1 [ ] 2 [ ] 3 [ ] 4 [ ] 5 [ ]

Comments

2. Quality of Work – Does employee complete assignments meeting quality standards? Consider accuracy, neatness, thoroughness and adherence to policy.

 Unacceptable………………………………………………………………………….Superior N/A

[ ] 1 [ ] 2 [ ] 3 [ ] 4 [ ] 5 [ ]

Comments

3. Quantity of Work – Consider the results of this employee’s efforts. Does employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules?

 Unacceptable………………………………………………………………………….Superior N/A

[ ] 1 [ ] 2 [ ] 3 [ ] 4 [ ] 5 [ ]

Comments

4. Work Habits – To what extent does employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules and organizational policies.

 Unacceptable………………………………………………………………………….Superior N/A

[ ] 1 [ ] 2 [ ] 3 [ ] 4 [ ] 5 [ ]

Comments

5. Communication – Consider job related effectiveness in dealing with others. Does employee express ideas clearly both orally and in writing, listen well and respond appropriately?

 Unacceptable………………………………………………………………………….Superior N/A

[ ] 1 [ ] 2 [ ] 3 [ ] 4 [ ] 5 [ ]

Comments

6. Planning and Organizing – Consider how well employee plans and organizes work; coordinates with others; and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.

 Unacceptable………………………………………………………………………….Superior N/A

[ ] 1 [ ] 2 [ ] 3 [ ] 4 [ ] 5 [ ]

Comments

7. Administration – How well does employee perform day-to-day administrative tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment; supervise students?

 Unacceptable………………………………………………………………………….Superior N/A

[ ] 1 [ ] 2 [ ] 3 [ ] 4 [ ] 5 [ ]

Comments

**PART II – BEHAVIORAL TRAITS**

1. Dependability – Consider the amount of time spent directing this employee. Does employee monitor projects and exercise follow-through; adhere to time frames; is on time for meetings and appointments; and responds appropriately to instructions and procedures?

 Unacceptable………………………………………………………………………….Superior N/A

[ ] 1 [ ] 2 [ ] 3 [ ] 4 [ ] 5 [ ]

Comments

2. Cooperation – How well does employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?

 Unacceptable………………………………………………………………………….Superior N/A

[ ] 1 [ ] 2 [ ] 3 [ ] 4 [ ] 5 [ ]

Comments

3. Initiative – Consider how well employee seeks and assumes greater responsibility, monitors projects independently, and follows through appropriately.

 Unacceptable………………………………………………………………………….Superior N/A

[ ] 1 [ ] 2 [ ] 3 [ ] 4 [ ] 5 [ ]

Comments

4. Adaptability – Consider the ease with which employee adjusts to any change in duties, procedures, supervisors or work environment. How well does employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?

 Unacceptable………………………………………………………………………….Superior N/A

[ ] 1 [ ] 2 [ ] 3 [ ] 4 [ ] 5 [ ]

Comments

5. Judgment – Consider how well employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically.

 Unacceptable………………………………………………………………………….Superior N/A

[ ] 1 [ ] 2 [ ] 3 [ ] 4 [ ] 5 [ ]

Comments

6. Attendance – Consider number of absences, use of annual and sick leave in accordance with University policy.

 [ ]  Unacceptable [ ]  Acceptable

Comments

7. Punctuality – Consider work arrival and departure in accordance with departmental and University policy.

 [ ]  Unacceptable [ ]  Acceptable

Comments

**PART III – EQUITY, DIVERSITY, & INCLUSION (EDI) CONTRIBUTIONS**

* Equity is defined as the commitment to fair and just treatment of all persons.
* Diversity is defined as individual differences such as race/ethnicity, class, gender, sexual orientation, country of origin, ability, religious affiliation, age, American veteran status, or geographic location.
* Inclusion is defined as the active, intentional, and ongoing engagement with diversity – in ways that increase awareness, content knowledge, cognitive sophistication, and empathetic understanding of the complex ways individuals interact within systems and institutions.

[EDI (Division of Equity, Diversity, Inclusion and Support Programs)](https://www.uww.edu/division-of-equity-diversity-inclusion-and-support-programs)

Employee demonstrates behaviors that celebrate the university’s mission, vision and values. This includes, but is not limited to, taking substantive measures to create and maintain a *transformational educational experience* that serves students from *diverse backgrounds, experiences, identities and abilities*.

Employee contributes to an environment free of bias, and serves and communicates in a manner that demonstrates diversity, inclusion, and an investment in a shared responsibility for these aims.

 Unacceptable………………………………………………………………………….Superior N/A

[ ] 1 [ ] 2 [ ] 3 [ ] 4 [ ] 5 [ ]

Comments

**PART IV - OVERALL PERFORMANCE**

Please use this space to describe the overall performance rating. Overall rating should be a reflection of performance factors and behavioral traits.

 Unacceptable………………………………………………………………………….Superior N/A

[ ] 1 [ ] 2 [ ] 3 [ ] 4 [ ] 5 [ ]

Comments

**SUPERVISOR SUGGESTED JOB RELATED IMPROVEMENT AND/OR**

 **DEVELOPMENT GOALS**

**EMPLOYEE COMMENTS:**

I have been advised of my performance ratings and career goals. I have discussed the contents of this review with my supervisor. My signature does not necessarily indicate agreement. My comments are as follows (optional). Attach additional sheets if necessary.

Employee Acknowledgement: Date:

Supervisor Signature: Date:

**SUPEVISOR RECOMMENDATION FOR PROBATIONARY EMPLOYEES**

[ ]   **Probationary period successfully completed.**

[ ]   **I do not recommend completion of probationary period.**

REVISED 2-2021