

# UNIVERSITY OF CALIFORNIA - OFFICE OF THE PRESIDENT

## PERFORMANCE EVALUATION FORM

Employee Name	Dept.: Unit:	Division
Job Title	Period covered by this evaluation From:     /   /   To:     /   /	Type of evaluation Probationary <input type="checkbox"/> Annual <input type="checkbox"/>
Supervisor's Name	Supervisor's Title	Supervised this employee since

### PURPOSE OF PERFORMANCE EVALUATION

The written performance evaluation is the last phase of the ongoing performance management and assessment process. It is a formal evaluation of performance over a specified period of time based on expectations identified by the supervisor and shared with the employee. It provides feedback to the employee and assists in planning for the next performance period. Informal performance evaluation is the on-going feedback required for effective supervisor/employee relations. The written evaluation should not replace continuing feedback and communications on job performance.

### TIMING OF EVALUATIONS

Career employees who have attained regular status must be evaluated formally at least once a year.

Probationary employees must be evaluated at least once; usually 30 calendar days before the completion of the probationary period.

### STEPS IN THE FORMAL EVALUATION PROCESS

1. Before completing this form and conducting the formal evaluation, the supervisor should complete the following steps:
  - Review Personnel Policies for Staff Members 23.
  - Review existing performance expectations and objectives and ensure that they are realistic and attainable during this rating period.
  - Meet with the employee to schedule the evaluation meeting and describe the evaluation process.
  - Suggest that the employee review the existing performance expectations and prepare a self-evaluation.
  - Prepare a draft of the evaluation.
2. The supervisor and employee meet to discuss both the self-evaluation, the draft, and future performance plans. The employee's comments should be encouraged.
3. The supervisor completes the final evaluation form based on discussion with the employee.

### RETENTION

Performance evaluations are retained in the employee's departmental personnel folder.

Record Copy: 5 years after separation. Other Copies: 3-5 years.

<p><b>RESPONSIBILITIES</b></p> <p>List responsibilities in order of priority. Responsibilities are key job functions/ duties which are listed on the position description.</p>	<p><b>RATING (check one)</b></p> <p>Exceeded expectations- - - - -</p> <p>Met expectations- - - - -</p> <p>Did not meet expectations- - - - -</p>	<p><b>EXPECTATIONS</b></p> <p>List performance standards for each responsibility. Performance is rated "Met Expectations" when these standards are achieved.</p>	<p>↓</p> <p>↓</p> <p>↓</p>



**PERFORMANCE STRENGTHS**

Describe aspects of performance that were outstanding.

**AREAS FOR IMPROVEMENT**

Describe areas where performance could be improved.

**OVERALL PERFORMANCE RATING**

Indicate overall rating of performance by placing a check mark in the appropriate box. The rating should be based on performance of all responsibilities and objectives listed for this review period. In the **Comments** section briefly state the reason for the overall rating, taking into consideration the ratings and specific examples cited for key areas of responsibility and individual performance objectives. The relative priority of the responsibilities and objectives should be considered. Also, exceptional circumstances that had an impact on results should be taken into account.

Did not meet Expectations	Short of Expectations	Met Expectations	Exceeded Expectations	Far Exceeded Expectations

**COMMENTS:**

**CONTINUE ON A SEPARATE PAGE FOR ADDITIONAL SPACE**

**SUPERVISORY PERFORMANCE EVALUATION-INSERT A**

Employee Name

Date

**AFFIRMATIVE ACTION & EEO**

Describe affirmative action efforts that this employee made during the rating period. Include consideration of new hires, employees who resigned, promotions, reclassifications, education support and development opportunities.

**DEVELOPMENT AND PERFORMANCE EVALUATION OF SUBORDINATES**

Discuss the quality, accuracy, and frequency of feedback given subordinates, along with efforts made to enhance their professional development.

**MANAGEMENT PRACTICES**

Discuss planning, delegation, communication, recognition, inter-departmental collaboration, work climate, budget control, and other management practices essential to performance and maximizing employee contribution and satisfaction.

**CONTINUE ON REVERSE, IF NECESSARY**

## FUTURE PLANS AND DEVELOPMENT ACTIVITIES

Discuss future growth, specific activities to improve performance and/or areas where further development would be beneficial.

## EMPLOYEE COMMENTS AND RECOMMENDATIONS

Supervisor's Signature

Date

Endorsing Supervisor's Signature

Date

Department Head's Signature

Date

**Employee's Signature:** Your signature indicates neither agreement nor disagreement, but it does indicate that you have read the evaluation, it has been discussed with you and that you have had the opportunity to record your comments.

Signature

Date