

# INSTRUCTIONS FOR COMPLETING PERFORMANCE EVALUATION

GENERAL – Detailed guidelines for evaluating performance have been issued to all departments in the publication “A Supervisor’s Guide to the STAFF PERFORMANCE EVALUATION PROGRAM.” Before completing a Performance Evaluation Report, a thorough review of the factors and ratings described in the publication is recommended. Additional copies of the publication are available from the Personnel Services Department.

COMPLETING THE EVALUATION REPORT – Final markings and comments on this Report should be in ink or typewritten. Additional pages may be used if more space is needed for narrative comments. The evaluation is to be discussed in a private interview with the employee. Any changes in the evaluation which may be made during the interview should be initiated by the employee. All attachments must be signed by the employee evaluator.

## EXPLANATION OF THE FORM

1. REPORT HEADING – Self-explanatory. Complete all items.
2. SECTION A – Each factor listed in this section must be checked (X) in an appropriate column. Any factor not considered applicable should be checked in Column – f. If additional factors are inserted in the “other” spaces provide, be certain they are job-related. (The lead person factors are not to be referenced in evaluating the performance of non-lead person personnel.)  
  
Each check mark placed in Columns a or b required explanation in SECTION C. Check marks in Columns d or e must be explained in SECTION B.
3. SECTION B – Record job strengths or instances of exemplary performance, including details of check marks in Columns d or e. Indicate progress or improvements resulting from the employee’s effort to meet previously established goals. Record agreement upon goals for future accomplishments. All attachments must be signed by the evaluator and the employee.
4. SECTION C – Record in specific detail the reason(s) for check marks placed in Columns a or b. All attachments must be signed by the evaluator and the employee.
5. SECTION D – The employee should sign and date this section (and any attachments to the report). The employee may comment in the space provided, or may use an attachment. If the employee prefers not to sign the report for any reason, the evaluator should so indicate in this section with the comment, “Employee declines to sign”, date and sign the statement.
6. SECTION E – Please be aware that certain bargaining contracts require a draft evaluation be given to the employee by a specific number of days prior to the evaluation being finalized. Please refer to specific contract language regarding required number of days. Each Performance Evaluation Report is to be reviewed and signed in this section by the person doing the evaluation before it is forwarded to the Human Resources Department.
7. SECTION F – A recommendation is required with the submission of a 9 or 18 month report for a probationary employee (one who is full-time, non-temporary).