

Supervisor Guidelines for Staff Employee Performance Evaluation

The Performance Evaluation process is intended to be a thoughtful exchange between the supervisor and the employee which supports the job performance and development of the employee by:

- Recognizing both challenges and achievements from the defined period of review.
- Identifying areas of opportunity for growth in the coming year.

Completion of the following sections of the UCSF Performance Evaluation Form for Staff Employees satisfies the basic annual documentation of an employee's performance that is required by policy. In addition to completion of the performance evaluation form, supervisors have the option of including pieces of information relevant to the evaluation of an employee's performance by attaching documents such as a detailed position description or details of specific goals and objectives for the evaluation period. Supervisors may also provide employees with the opportunity to provide a self-evaluation by asking the employee to complete the form.

Required: Section 1: Manager's Assessment of Performance Factors and Achievement:

- Assess employee's level of performance for each performance factor.
- Check a performance rating value for each factor or check "Not Applicable" if the factor is not relevant to the employee's position.
- If you would like to include more detail on the employee's specific job responsibilities you may attach a copy of their current performance evaluation.
- You may enter brief comments next to each factor if further clarification is needed, or summarize your comments in Section 2.
- If comments are provided make certain they are factual and can be supported by specific examples and/or documentation.

Required Section 2: Manager's Comments on Overall Performance:

- Utilize this section to summarize the employee's performance appraisal for the current period of review.
- You may wish to reference the extent to which goals have been met; development plans have been achieved; performance has changed since the previous evaluation; etc.

Tips:

- *Feedback should:*
 - *Be constructive (fact-based and objective) and should be tied to the employee's job duties, performance expectations as well as help to identify areas of growth for the coming review period*
 - *Recognize and reward employee contributions*
 - *Be an interactive dialogue, with contributions from both parties*
 - *Dialogue may or may not result in the change of certain ratings. The supervisor is responsible for making the final determination of performance ratings.*
- *Feedback should not:*
 - *Be a surprise to the employee*

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- *Reference approved leaves of absence*
- *Reference non-disciplinary actions (e.g. counseling memos)*
- *Include inflammatory language*
- *Conduct a performance review meeting in a private area, such as an office or meeting room*
- *Supervisor should collaborate with employee on strategies for achieving identified Professional Goals and Development Plans for the coming review period.*
- *Supervisors may provide employees with the opportunity to provide a “self-assessment” of performance and compare the results during the performance review meeting.*

Optional Section 3: Employee’s Development Plan:

- Employees should exercise initiative to collaborate with supervisors in creating their development plan.
- Development plans are generally related to the areas that an employee wants to develop in order to progress in their position (e.g. skills needed to perform the job well and identification of those areas in which there is room to grow).
- Supervisors should provide feedback, tools and resources to assist the employee in accomplishing their plan.
- It is recommended that supervisors check in on the status of their employee’s progress on the development plans at regular one on one meeting or on a quarterly basis.

Optional Section 4: Employee’s Comments on Performance:

- Supervisors may encourage employees to make comments on their performance assessment to increase engagement and ownership of results.

Required: Section 5: Overall Appraisal Rating:

- After reviewing your ratings in Section 1 and your comments in Section 2, indicate one overall appraisal rating for the employee.
- The overall rating should reflect not only the average of ratings in Section 1, but should also be weighted by the overall performance described in Section 2.
- Completed performance evaluations are submitted to your Shared Services representative for insertion into the employee’s personnel file.
- Provide a copy of the signed evaluation to the employee.

Required: Section 6: Performance Evaluation Signatures and Dates

- Supervisor signs and dates in the left-hand field
- Employee signs and dates in the right-hand field
 - Note: Some employees feel that signing the form somehow signifies their agreement with the evaluation. The employee signature actually signifies receipt of the performance evaluation.