Performance Review and Plan: A Guide for Supervisors

The Performance Review and Plan gives you the opportunity to review the performance of the employee during the past evaluation period and make a plan for the coming period.

The Performance Review and Plan Packet includes: The Performance Review Workbook, the General Descriptors of Category 1 through 6 and The Performance Review and Plan document (HRM-44).

1. The Performance Review Workbook

   The workbook contains eight (8) criteria that represent the values of the health science center. These values apply to each employee of the institution regardless of position.

   The workbook has two purposes. First, it is provided to all new employees along with the Planning Guide/Job Description (HRM-43). The eight (8) criteria represent HOW the job is done. The Planning Guide/Job description represent WHAT is done. These two items inform the employee of all criteria that his or her evaluation will be based upon and clearly establishes expectations.

   Second, the workbook also provides the supervisor with definitions of the eight (8) criteria. It will assist in identifying levels of performance. Use the workbook as a type of diary to record and date specific, relevant employee actions and conduct during the course of the evaluation period. Keep it as part of the departmental personnel records maintained for each employee. The workbook is for departmental use only and is not submitted to Human Resource Services.

2. Performance Review and Plan (HRM-44)

   Section I: HOW the Employee Does the Job

   This section represents 50% of the performance review score. Based on the definitions and notes in the workbook, enter a score from one (1) to six (6) for each of the eight (8) criteria. Follow the instructions for Section I on the form.

   Section II: WHAT the Employee Does; Specific Activities, Duties, Tasks and Objectives

   This section represents 50% of the performance review score. Enter the Activities and Duties, Performance Standards and weights from the employee’s Planning Guide/Job Description. Using the General Descriptors of Categories 1 through 6, assign a score based on the level of performance the employee has exhibited during the past evaluation period. Follow the instructions for Section II on the form.

   Section III

   Section III provides the opportunity for written comments or personalized feedback, customized to each individual employee.

   Performance Score

   The performance score is achieved by adding the numerical ratings from Section I and Section II and dividing the total by two (2).

   Signatures

   The form is signed and dated by the employee, the supervisor and the department chair/head. Submit the Performance Review and Plan (HRM-44) to Human Resource Services.