

UNIVERSITY *of* NORTHERN COLORADO



Performance Plan/Evaluation Form

Instructions

Planning Process

1. Read the Performance Planning and Evaluation Process, Sections 3-4-112 and 3-4-113, in the University Regulations.
2. List the major goals or responsibilities included in the new performance plan. See section 1.
3. Describe any training/developmental activities or make general comments for the evaluation period. See section 2.
4. At the beginning of the planning period, select the performance factors in section 3 that will be evaluated at the end of the planning period. Select performance factors relevant to the employee's job and add other factors as necessary. For each relevant factor, in the "Identify Level of Importance" column, identify level of importance as High, Medium, Low, or N/A. See section 3. Upon completion of the planning process supervisor and employee initial and date the planning complete section.

Evaluation Process

5. At the end of the evaluation period, enter a number in the column corresponding to the employee's performance rating in section 3. Use the comment section of the grid to record examples that substantiate ratings—particularly in the case of "Unsatisfactory" or "Needs Improvement" ratings. See section 3.
6. Describe the extent of the employee's success in meeting goals, responsibilities, and developmental plans. Substantiate by giving examples. See section 4.
7. Make any additional comments. See section 5.
8. Check overall evaluation rating. See section 6.
9. After meeting with the employee, sign the form and have the employee sign the form. See section 7.
10. Keep a copy of the evaluation for your records.

Performance Plan/Evaluation Form

Employee Name: _____ Job Title: _____
Bear Number: _____ Location/Department: _____
Supervisor: _____ Review period beginning _____ and ending _____
Planning Complete _____
Supervisor Initials Employee Initials Date

Planning Section

1. Goals for Evaluation Period

List the major goals or responsibilities agreed upon as part of the plan for the evaluation period:

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____
- 6. _____

2. Developmental Plans/Planning Comments

Use the space below to describe training, developmental plans or general comments for the evaluation period:

Evaluation Section

3. Performance Ratings

*During planning phase identify level of importance as High, Medium, Low, or N/A. When completing the evaluation phase, use the following rating system:

- 1=Unsatisfactory
- 2=Needs Improvement
- 3=Achieved Expected Outcomes
- 4=Exceeded Expected Outcomes

*Identify Level of Importance	Performance Factors	Rating	Comments
	Quality of Work		
	Job Knowledge		
	Timeliness		
	Judgment		
	Initiative		
	Interpersonal Skills		
	Communication		
	Customer Orientation		
	Budgeting		
	Leadership		
	Planning and Organization		
	List any additional factors specific to position:		

4. End of Year Meeting

To what extent was the employee successful in meeting agreed upon goals, responsibilities, and developmental plan? Explain and substantiate with examples.

5. Supervisor's Comments

Use the space below to record any other comments regarding the employee's job performance:

6. Overall Rating

Check one:

Unsatisfactory

Needs Improvement

Achieved Expected Outcomes

Exceeded Expected Outcomes

7. Representations and Approvals

Supervisor's representations:

I have met with the above-named employee to discuss and review this performance appraisal.

Supervisor's Signature:

Date:

Employee's representations:

I have had the opportunity to review this performance appraisal and to discuss it with my supervisor:

Employee's Signature:

Note: Signing does not mean agreement with the appraisal, merely that the employee has reviewed and discussed the appraisal with his or her supervisor.

Date:

Employee's comments:

Use the space below to record your comments regarding your supervisor's appraisal of your job performance:
