UNIVERSITY OF MINNESOTA

Route this form to:	**U Wide Form**
This form is for departmental use.	UM 942
	Rev: 06/08

Administrative Summary of Performance Appraisals

Use this form at the end of the year to convert the ratings done on the Performance Appraisal form (UM 941) into a rating for each appraisal and an average for the year as a whole.

The form guides you step-by-step through the simple calculations. It takes about 15 minutes to complete the form. A pocket calculator may be needed. This form may be completed by someone other than the supervisor since the performance ratings have already been determined.

Step 1: Collect all the performance appraisals done this fiscal year. Photocopy Section II of each form.
Step 2: Calculate a rating for each appraisal and an average rating for the year using the worksheet on page 2 of this form.
Step 3: Complete the administrative process as follows:
- Attach a copy of Section II of each performance appraisal (UM 941) form.
- Discuss the average rating with the employee and obtain signature.
- Forward this form and the attachments to the dean, director or department head for review, a salary action or other decision (if appropriate) and a signature.

Employee Name		Employee ID
DeptID	Entity	College/ Administrative Unit
Classification Title	Job Code	Date appointed to Job Code

	Overall Average (on a scale of 1-7)	Schedule/Range No.
☐ Performance Appraisal: ☐ 3 mo. ☐ 6 mo. ☐ 12 mo. Dates covered: from _____ to _____		**OR** Rate Arranged
☐ Probationary Appraisal: ☐ 3 mo. ☐ 6 mo. ☐ 12 mo. Dates covered: from _____ to _____ Does employee pass probation? ☐ Yes ☐ No		☐ Below Midpoint ☐ At or Above Midpoint ☐ At Maximum or Above

Rater's Comments:	
Rater's Signature	Date
Rater's Name (printed)	Phone
Title	
Campus Address	

The employee's signature means only that the employee has had the opportunity to review this summary of previous appraisal.

Employee's Comments:	
Employee's Signature	Date

Dean, Director or Department Head's Signature	Date
Dean, Director or Department Head's Name (printed)	Phone

Step 1: **Figure the weighted rating for each performance appraisal, as follows:**

- **Transfer** the percentages listed in the summary at the bottom of Section II to the boxes below. (This shows what percentage of the job was performed at each level.)
- **Multiply** the percentage listed under each rating category by the number for that rating category. (This ensures that the most important parts of the job will have the most influence on the average rating.)
- **Add** the results of those multiplications together. (This is the average rating for each appraisal.)
- **Multiply** the ratings by the number of months the appraisal covered. (This ensures that the appraisal that covered the most time will have the most influence on the overall average for the year.)
- **Sum** the weighted ratings and the number of months covered by the appraisals.

Not Satisfactory	Marginal	Achieved Expectation	More than Expected	Much more than expected	Achieved Excellence	Exceptional Achvmnt.
1	2	3	4	5	6	7

First Appraisal: From _____ to _____

%	%	%	%	%	%	%	Rating for 1st Appr.	# of months	Weighted Rating
x 1	x 2	x 3	x 4	x 5	x 6	x 7			
							=	x	=

Second Appraisal: From _____ to _____

%	%	%	%	%	%	%	Rating for 2nd Appr.	# of months	Weighted Rating
x 1	x 2	x 3	x 4	x 5	x 6	x 7			
							=	x	=

Third Appraisal: From _____ to _____

%	%	%	%	%	%	%	Rating for 3rd Appr.	# of months	Weighted Rating
x 1	x 2	x 3	x 4	x 5	x 6	x 7			
							=	x	=

Fourth Appraisal: From _____ to _____

%	%	%	%	%	%	%	Rating for 4th Appr.	# of months	Weighted Rating
x 1	x 2	x 3	x 4	x 5	x 6	x 7			
							=	x	=

Total Months	Sum of Weighted Ratings

Step 2: **Figure the overall average for the year (or to date), as follows:**

- **Write** the sum of the weighted ratings in the space BELOW and divide by the total number of months the appraisals covered.
- **Round** to the nearest tenth of a point.
- **Write** the overall average for the year in the box at the far right and again on the front of this form.

Sum of weighted ratings		Total months		Which rounds to
	÷		=	

**Overall Average
On a scale of 1-7**