We have developed a more succinct performance appraisal tool for those areas that have not yet moved to a customized template. Customized Excel templates mirror the responsibilities reflected in the position description of the employee being evaluated. A customized template is an effective appraisal tool; please continue to use these where available.

The new tool is replacing the standard Word templates for administrative and staff employee appraisals. This tool can be used in evaluating both salaried (administrative) and hourly (staff) employees. The new template focuses on both the contributions of the employee (Functional Knowledge & Skills, Delivered Results, Problem Solving and Client Focus) and the manner in which they carry out their responsibilities (Communication, Collaboration, Dependability and Professional Conduct).

A four-step rating scale provides the opportunity to recognize the exceptional performer, the solid performer who is meeting and sometimes exceeding requirements, the individual who is learning or perhaps struggling with some of their responsibilities, as well as the employee whose performance is unsatisfactory.

Finally, the professional development plan section guides the conversation to preparing for the upcoming year.

As with the earlier Word templates, please adhere to the following process:

1. Employee evaluates their work performance in relation to the current job requirements and forwards the completed form to the supervisor by the time designated by the supervisor.
2. Supervisor reviews self-appraisal and completes sections identified for supervisor evaluation.
3. Employee and supervisor meet to discuss the appraisal and expectations for the upcoming year.
4. Signed and dated copy is returned to Human Resources & Compliance by June 15.

If you have any questions on this new appraisal tool or the performance management process, please contact Human Resources & Compliance.