

**Article XX. Performance Evaluations**

Section 1. General Provisions

Supervisors or their designees will conduct performance evaluations and have performance evaluation meetings with the employees at least once per annum, starting 2023, though employees may request evaluation more frequently. Performance evaluations are intended to help employees identify opportunities for professional growth and reinforce the importance of their contributions to the University. They may be referenced in subsequent corrective action. Plans for employee development may consist of but not be limited to internal or external training, mentoring, and additional supervisory support. Evaluations shall be used to determine an employee's eligibility for promotion and/or salary adjustment.

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- Deleted: shall not be used to initiate personnel actions or corrective action but
- Deleted: may include both employee and supervisor actions and
- Deleted: Additional evaluations can be requested by the employee if job duties and/or performance changes call for position/salary adjustments.

Section 2. Performance Evaluation Information

Within sixty (60) calendar days of employment to a position, the employee's supervisor will meet with the employee to discuss how job duties are evaluated and provide the initial written performance expectations.

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- Deleted: The Employer will provide at least sixty (60) calendar days' notice to employees prior to the evaluation when modifications that substantively alter performance expectations are made. Minor modifications that do not substantively alter performance expectations require no notice.¶

If the employee's performance goals or expectations have been changed over the course of the year, these changes should be documented in writing by the supervisor and provided to the employee. Annual performance evaluation may include goals or expectations that have been added within the last forty-five (45) days for the purpose of feedback and documentation.

Section 3. Performance Evaluation Process

The supervisor will communicate with the employee about performance problems as they occur, and develop and document a joint plan for performance improvement, with the final plan determined by the Employer.

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In addition, supervisors shall initiate an annual evaluation meeting. The purpose of the annual evaluation meeting is to review and discuss the employees performance. The employee shall have an opportunity to discuss the evaluation with the supervisor and is encouraged to contribute. Employees may also provide a written response that is either included as part of, the evaluation form or attached to the evaluation.

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The performance evaluation meeting shall include the following:

- review of the employee's job description, and making revisions if applicable;
- assessing the employee's progress toward achieving project goals and objectives;
- recognition of individual accomplishments and opportunities for growth;
- update of salary funding circumstances which may impact the employee;
- feedback from the employee on how the supervisor can support the employee's professional goals.

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- review of the current funding sources and known end dates as well as any potential prospective funding sources and projected timelines which may impact the employee.

Supervisors may solicit performance feedback from others who have knowledge of the employee's performance as appropriate. Employees may suggest individuals to provide performance feedback.

The final evaluation, with employee comments and supplemental documents attached, shall be signed by the supervisor and the employee. The employee will be provided a copy. The employee signature means that the employee has seen and is aware of the content of the evaluation, but does not necessarily mean that the employee agrees with the evaluation content.

Performance evaluations may be completed using the University Human Resources Performance Evaluation forms.

Performance evaluations will at a minimum include the following:

- A. A copy of the current job description and previously established goals performed by the employee may be evaluated based on the following factors:
  1. quality of work (e.g. competence, accuracy, neatness, thoroughness),
  2. quantity of work (e.g. use of time, volume of work accomplished, ability to meet schedules, productivity levels),
  3. job knowledge (e.g. degree of technical knowledge, understanding of job procedures and methods),
  4. working relationships (e.g. cooperation and ability to work with supervisor, co-workers, students, and clients served), and
- B. 5. leadership skills – if applicable (e.g. training and directing subordinates, delegation, evaluating subordinates, planning and organizing work, problem solving, decision making ability, ability to communicate). Provision for employee's comments/self assessment of job duties, achievements, other activities, and references.

The performance evaluation form may be supplemented with other forms and/or information used to support the employee's evaluation.

If the evaluation and supplemental information indicates that a reclassification may be appropriate, a position review can be requested in accordance with Article XX Classification-Reclassification, Section 5 Position Review.

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**Deleted:** The effective date of any promotion and/or salary adjustment resulting from a performance evaluation shall be no later than ten (10) business days following signature on evaluation form.

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**Deleted:** provided form template in Appendix XX: Performance Evaluation Form.

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**Deleted:** A detailed description of current job duties/expectations performed by the employee to be filled out by the supervisor. Current job duties listed in description will be evaluated based on these factors:

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The performance evaluation form may be supplemented with other forms and/or information if applicable.

**Deleted:** <#>Provision for identifying career advancement goals, including job duty changes required for position advancement, training, development plans, and other comments. The supervisor will also review the current funding sources and known end dates as well as any potential prospective funding sources and projected timelines with the employee. <#>Position evaluation to assess appropriate job title according to job duties detailed in Section A above.

<#>Summary and recommendations  
<#>Based on the evaluation form and any supplemental information, the supervisor will make a determination if the employee is eligible for a promotion and/or salary adjustment.  
<#>If the employee is determined ineligible for promotion and/or salary adjustment, a detailed written explanation and performance expectations to achieve eligibility will be provided upon completion of the evaluation.

<#>Compensation guidelines for promotion and/or salary adjustment eligibility based on performance evaluations are provided in Article XX Compensation.

**Deleted:** Upon request, an employee may review any written materials used by supervision to prepare the evaluation.