

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 ~~calendar year~~ 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. Performance evaluations shall not be used to initiate personnel actions or corrective action, but they may be referenced. Plans for employee development ~~may include both employee and supervisor actions and~~ 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. 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, using the performance evaluation form described in Section 4.

~~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 will be documented in writing by the supervisor and provided to the employee with at least forty five (45) calendar days' notice. If the performance evaluation occurs within 45 days notice, the employee shall not be negatively evaluated on these changed duties.

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.

In addition, supervisors shall initiate an annual evaluation meeting. The purpose of the annual evaluation meeting is to review and, discuss the employee's performance, and if appropriate, ~~modify the evaluation~~. The employee shall have an opportunity to discuss the ~~proposed~~ evaluation with the supervisor and is encouraged to contribute. Employees to may also provide a written response ~~that is included in the form to be evaluated.~~ If the employee chooses to provide a written response, it will be included in the form to be evaluated.

The performance evaluation meeting shall include the following:

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

~~Comments from faculty, students, clients, peers, and others may also be included as appropriate. Supervisors and/or employees may solicit performance feedback from others who have knowledge of the employee's performance as appropriate.~~

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

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.

~~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.~~

Section 4. Evaluation Forms

Performance evaluations shall ~~may~~ be completed using the provided form template in **Appendix XX: Performance Evaluation Form**.

Performance evaluations ~~forms~~ will at a minimum include the following:

- A. A copy of the current job description and previously established goals performed by the employee will be evaluated based on the following factors:~~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:~~
 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
 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).
- B. Provision for employee's self assessment of job duties, achievements, other activities, and references.
- C. Provision for identifying career advancement goals, including job duty changes required for position advancement, training, development plans, and other comments. ~~The supervisor will review the current funding sources and known end dates as well as any potential prospective funding sources and projected timelines with the employee.~~
- D. Position evaluation to assess appropriate job title **classification** according to job duties detailed in Section A above.
- E. Summary and recommendations
- A. Based on the evaluation form and any supplemental information, the supervisor will make a determination if the employee is eligible for a ~~promotion~~ **reclassification** and/or salary adjustment.
 - B. If the employee is determined ineligible for ~~promotion~~ **reclassification** and/or salary adjustment, a detailed written explanation and performance expectations to achieve eligibility will be provided upon completion of the evaluation.
 - C. Compensation guidelines for ~~promotion~~ **reclassification** and/or salary adjustment eligibility based on performance evaluations are provided in **Article XX Compensation**.

The performance evaluation form may be supplemented with other forms and/or information used to support the employee's evaluation. Upon request, an employee may review any written materials used **by the supervisor** ~~supervision~~ to prepare the evaluation.

If the evaluation and supplemental information indicates that a reclassification may be appropriate, a position review shall be requested in accordance with Article XX Classification-Reclassification, Section 5 Position Review. Position review and salary adjustment requests shall be submitted to UWHR Compensation Office in a timely manner.