

## Performance Management and Development Program Forms Instructions

*These are to be used with the Performance Management and Development Program Forms (spreadsheet), these are also at the top of each tab in the spreadsheet.*

This form should be completed throughout the performance management and development program to include goal and expectation setting, mid-point checkin, and summary evaluation. For new employees, begin this process within 60 days of hire date; for returning employees, the process restarts after each evaluation period.

Employee & Supervisor comments may be added in the spaces provided. A final copy signed by both employee and supervisor should be submitted to your School, College or Unit HR Business Partner.

**Expectations/Goal Setting tab:** During a scheduled meeting, the supervisor and employee discuss and develop goals and expectations in a joint effort, review position description, and identify training and development opportunities. List 3 – 5 goals to accomplish over the next year. Goals may focus on a variety of areas including university strategic goals, school/college/unit and department priorities, job related projects, professional/job related behaviors to be improved, or skills/practices that could be further developed. Goals may also carry over from previous years. Goals should be Specific, Measurable, Achievable, Relevant, Timely (SMART) and agreed upon by the employee and supervisor. This will be utilized to fill in goals, updates, progress and/or completion throughout the year.

Performance Criteria (commitment to mission and strategic goals, commitment to job, positive approach to change and improvements, and commitment to fostering a sense of belonging) should also be included in expectations & goal setting conversation, as it will be reviewed in relation to performance at the mid-point and summary evaluation.

**Ongoing Notes tab:** Between the Expectations/Goal Setting and Mid-Point Check In meetings, regularly scheduled informal conversations are to be conducted to review work, coaching opportunities, accomplishments, projects, and professional development. This is a space to record notes from those check ins.

**Mid-Point Check In:** This is an opportunity for employee and supervisor to have an intentional check-in on goals and performance expectation's part way through the evaluation period to identify areas of success, challenges, progress on goals and professional development plans. This is also an opportunity to realign or adjust goals and expectations at this point in the year. Utilize the Expectations/Goals portion of this form as a support for this conversation.

**Supervisor Summary Evaluation tab:** Towards the end of the evaluation period, the supervisor completes the job responsibilities and behaviors for success sections of the summary evaluation. Concurrently, the employee fills out the employee self-appraisal. Once all sections have been completed the supervisor and employee will meet one on one to review the information from expectations/goal setting, mid-point check in, and summary evaluation.

**Employee Summary Self-Appraisal:** Self-Appraisal is an optional opportunity for the employee to highlight key accomplishments during the evaluation period and areas for development.