

MEMORANDUM

TO: UWSA Employees

FROM: Shenita Brokenburr
Senior Associate Vice President, Chief Human Resources Officer

DATE: May 14, 2018

SUBJECT: Annual Performance Evaluations due Friday, June 29, 2018

It's once again time for annual performance evaluations to be completed for all UWSA employees. Performance Management is an ongoing dialogue between supervisors and staff with regular touchpoints to review and discuss performance expectations, goal achievement and/or barriers, successes and opportunities for improvement. The annual performance evaluation is the culmination of these ongoing discussions.

Your supervisor will be reaching out to you to schedule this conversation between now and the end of June. It is important that you prepare for this conversation. Perform a self-assessment of your performance, identify achievements as well as opportunities to improve. Consider goals you would like to accomplish in the short-term and long-term. Bring this information to the annual performance evaluation meeting with your supervisor.

For more information about this year's process, please review the resources identified below and/or attend one of the information sessions. The performance evaluation process, forms and review cycle may be modified for next year.

EMPLOYEE INFORMATION SESSIONS

DATE	TIME	LOCATION
Wed., May 30 th	1:00 p.m.	Van Hise 1820
Thurs., May 31 st	10:00 a.m.	Regent 126 A/B

ADDITIONAL RESOURCES

- [Performance Management](#) webpage
- UWSA Guide to Performance Evaluations, included with this memo

QUESTIONS

If you have questions regarding performance evaluations, contact Debbie Schwandt at dschwandt@uwsa.edu or 262-8299.

UWSA Guide to Annual Performance Evaluations May 2018

PERFORMANCE MANAGEMENT AND ANNUAL PERFORMANCE EVALUATION OVERVIEW

On-going dialogue and evaluation of performance are essential to the performance management process. This requires regular touchpoints throughout the review cycle between supervisors and staff members to discuss general performance expectations and completion of projects and assignments. This also allows for timely discussions related to reassessment of goals due to barriers as well as performance improvement. If a staff member or supervisor has questions regarding performance during the year, either party is encouraged to initiate an interim meeting to informally discuss the concern.

The annual performance evaluation is one step in the performance management process and the culmination of a year-long dialogue between supervisors and staff members. The annual evaluation is a conversation where both parties participate and review achievements and performance improvement opportunities. It is an opportunity for both the supervisor and staff member to identify 3 to 5 performance goals, ideally tied to UWSA's strategic goals, as well as career development goals. Although the evaluation of performance is a supervisory responsibility, staff members' comments are included as part of the official record.

Evaluations are based upon objective and measurable standards that relate to the primary responsibilities of the position. In preparation for the formal performance evaluation meeting, the supervisor and staff member should review and, if necessary, update the responsibilities as identified in the position description. It is critical any change in duties is reviewed and acknowledged by the staff member. Whenever a position description is updated, the signed document should be sent to the UW System Human Resources Office for inclusion in the staff member's official employee file.

ANNUAL PERFORMANCE EVALUATION PROCESS

The annual performance evaluation process incorporates the following steps:

1. Supervisors sets a date for the performance evaluation meeting
 - a. Ensure discussion between supervisor and employee is face-to-face
 - b. Review period is based upon the prior fiscal year: July 1 – June 30
2. Supervisor / employee prepare for the meeting by assessing / self-assessing the following:
 - a. Review expectations, goals, achievements and opportunities for improvement
 - b. Review and update as needed established goals
 - c. Identify future goals for the short-term and long-term, tied to UWSA's strategic goals
 - d. Consider career and other development opportunities
3. Supervisor / employee attend the performance evaluation meeting
 - a. Discuss the items listed in #2
 - b. Ensure this is a conversation between both parties
4. Supervisor finalizes the written evaluation document (see next section) and gathers signatures
 - a. Employee signature on the form indicates they have reviewed the evaluation document
 - b. Employee may provide written comments on the evaluation document
 - c. Supervisor will provide a copy of the signed written evaluation to the employee
5. Supervisors must submit the performance evaluation document to Debbie Schwandt in UW SHR @ 780 Regent Street or via email dschwandt@uwsa.edu by June 30, 2018.

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ANNUAL PERFORMANCE EVALUATION DOCUMENTATION

Supervisors may document the annual performance evaluation in the following ways:

- Utilize the UWSA Performance Evaluation Form (form may be found on the H:drive at H:Forms\HR-Payroll Forms\UWSA Perf Eval Form 05-2018)
- Provide annual evaluation documentation through:
 - Memo or alternative evaluation form
 - Must include overall performance category rating from UWSA Guide to Performance Evaluations
 - Must document completion of mandatory training (Title IX/Sexual Harassment and Information Security Awareness)

OVERALL PERFORMANCE CATEGORY DEFINITIONS

Outstanding Performer

Rare superior performance. Consistently surpasses performance expectations and goals. Achieves beyond the regular assignment in all areas throughout evaluation period. Contributes to the organization's success by adding significant value well beyond job requirements.

Exceeds Expectations

Frequently exceeds performance expectations and job requirements – demonstrates very high level performance in all areas of responsibility.

Solid Performer

Independently and competently performs all aspects of the job function, responsibility or goals. Consistently fulfills expectations and at times may exceed expectations.

Satisfactory

Competently performs most aspect of the job function, responsibility or goal. May require improvement in one or two areas of consistent weakness to meet expectations.

Unsatisfactory

Consistently below expectations and/or has failed to make reasonable progress toward goals.