



Human Resources & Employee Development

Location University Center • Address 1215 N. Patterson St.

Phone 229-333-5709 • Fax 229-259-5030

Web services.valdosta.edu/human_resources/

Purpose

To provide instructions for the preparation of Performance Evaluations on Staff Employees.

Policy

Supervisors must complete a Performance Evaluation on each staff employee as follows: during the probationary period (initial evaluation), annually, upon transfer, and special evaluations when required.

Procedure

Counseling & Documentation

Effective use of Performance Evaluations must be coupled with effective counseling and documentation. Documentation is written and dated notations of an event or an action taken concerning performance and/or behavior. This may be formal or informal (i.e., typed memorandums for the record or pencil notes). During the year or other rating periods, always document all important items and events, both good and bad, (i.e. Jane Doe on date, time was absent without permission, etc.). All verbal counseling should be documented in this manner as well. Notes should be added when problems are resolved.

Category

Performance Evaluations will be completed and forwarded to Human Resources as outlined below:

- 1. Probationary Evaluation**— Prepare a performance evaluation just prior to, or upon completion of, the initial six months of employment. The recommendation of the rater for continued employment is required in the space provided at the bottom section of the form. This initial evaluation is due in Human Resources not later than one week after the end of the probationary period. If a probationary period employee is to be terminated, the performance evaluation form should be received in Human Resources prior to the completion of the probationary period.
- 2. Annual Evaluation**— Prepare this evaluation each year for regular status employees between March 1 and March 30. An Annual Evaluation is not required if a previous evaluation has been prepared within the past month for other reasons such as completion of probationary period of employment, transfer, etc. This evaluation is due in Human Resources no later than March 30 each year.
- 3. Transfer Evaluation**— Prepare this evaluation when an employee transfers to another supervisor. A Transfer Evaluation is not required if an evaluation has been prepared for some other reason within the previous three months. It is due in Human Resources no later than one week after the effective date of transfer.

- 4. Special Evaluation**—Prepare for reasons other than those listed above. The reason for a Special Evaluation should be stated in the General Comments section. An employee who received an overall evaluation of **Unsatisfactory** in item #8 of an Annual Evaluation, will either be terminated or placed on probation for a period of time specified by the rater. A Special Evaluation will be prepared at the end of a special "probationary period." It is due in Human Resources no later than one week after the end of the special "probationary period." Special Evaluations must be authorized by Human Resources in advance of such actions.

General Instructions

Complete all appropriate items listed in the heading, to include the date of the evaluation. Consider the individual's entire work performance on each trait being rated. Your judgment should not be based on any one or two occurrences. Do not allow personal feelings to govern your ratings.

Select the statement that most nearly describes the employee's performance and place a check mark in one of the two blocks (the right block indicates higher performance than the left block.) It is recommended that a black felt tip pen be used to place a check mark in the appropriate blocks. Line through any words or phrases in the block selected that are not applicable.

Enter additional comments, when desired or appropriate, in the space provided for each trait. Major weak points or major strong points may be outlined in the General Comments section at the bottom. Attach a separate sheet if required for additional information or remarks. The rating entered in the overall evaluation section should be a summary of the individual's overall performance in all of the traits rated.

Review the completed evaluation with the rated employee in a private location. After your discussion is completed, have your employee sign the form in the space provided. If the employee is reluctant to sign the form because of disagreement with the evaluations and/or comments, advise the individual that his signature does not signify agreement with the evaluation, but only that it has been reviewed and discussed with him. Advise the employee that their comments may be written on the reverse side of the form, or attached on a separate sheet and will be filed with this evaluation. If the employee still refuses to sign, write this in the space provided for the employee's signature.

The employee should be provided a copy of this document following supervisory review. The original signed copy of this form should be forwarded to Human Resources in a sealed envelope to be filed in the employee's personnel record.