

Staff Performance Evaluation Instructions

In accordance with Texas A&M University System Regulation 33.99.03 and procedures adopted by Tarleton State University, the performance of non-faculty employees of Tarleton shall be evaluated at least annually, normally near the start of the calendar year. This annual evaluation should not prevent discussions with employees regarding their performance on an on-going basis.

The goal is to reach a mutual understanding of the expected standards of performance, and rate the employee's performance based on those standards. Take time to think through and complete all sections as the information recorded on this form will become part of the employee's personnel record, and may be used in decisions concerning advancement, future training needs, performance-related salary adjustments, or even disciplinary actions.

Purpose of the Performance Evaluation

- Inform employees how they are meeting job expectations and standards
- Identify areas for improvement
- Set specific objectives
- Provide employees an opportunity to discuss their career goals and the support needed to meet the goals
- Assist in evaluating the workforce
- Aid in identifying employee potential
- Establish priorities for training, education and reward

Performance Evaluation Steps

Step One – Schedule a time for the evaluation meeting with the employee

- Allow sufficient time for the employee to complete and submit a self-appraisal of their performance, and time for you to review that self-appraisal prior to the meeting.

Step Two – Prepare for the evaluation meeting

- Review Position Description to familiarize yourself with the employee's specific job duties and note any area of the position description that requires updating.
- Review employee performance notes you made during the rating period for the employee being evaluated.
- If the employee has submitted their self-appraisal prior to the evaluation meeting, then review the employee's self-appraisal.
- Complete the Staff Performance Evaluation form
 - A comment must be made for a Performance Factor if the highest or the lowest rating is given. Comments should be:
 - Meaningful
 - Measurable
 - Specific
 - Objective
 - Comments are highly encouraged regardless of the rating

- Consider the employee’s performance for the entire rating period, not just the last few months
- Evaluation should be against the job requirement and not based on subjective measures
- Evaluation should stand on its own and be defensible (good or bad)
- Evaluate ALL Performance Factors on the evaluation form
 - Non-supervisory employees do NOT require evaluation on Performance Factors 8 and 9
 - Criteria listed for each rating level are provided for guidance. An employee does not need to meet each item in that rating to receive that rating. Appropriate supervisory judgment should be used when applying a rating.
 - Justify the rating by providing specific examples of how the employee exhibited performance of the area.
 - The following table provides a high level definition for the Performance Factor ratings (Note: each Performance Factor has unique criteria for that performance factor)

PERFORMANCE FACTOR RATING SCALE	
5	Outstanding – Highest level of performance; this rating is given to any employee who consistently does far more than expected for the position. Numerous objective examples that support the rating are easily identified.
4	Exceeds Expectations – This rating is given to an employee who consistently does more than expected for the position. Rating should be easily supported by several objective examples of going beyond job requirements.
3	Meets Expectations – This rating is given to an employee who has consistently and fully satisfied the high performance expectations of Tarleton for the specific duties of the employee’s position.
2	Improvement Needed – This rating is given to an employee who did not consistently meet performance expectations of the employee’s position.

- Assign a weight to each of the performance factors. The performance factor weights should total 100.

Weight is used to provide emphasis to key aspects of the employee’s position.

- Key Objectives and Job Tasks is an optional section used at the supervisor’s discretion to emphasize a particular goal, objective, or job duty.
 - A weight should be assigned to each item evaluated in this section for the automatic calculation function to work properly.

- Current Goals is a listing of goals established during the review period being evaluated.
- The “Goals for the Next Review Period” section may be used to document goals established by the employee and supervisor. A minimum of one goal should be assigned to the employee.
- The Overall Performance rating is determined by the supervisor. The Calculated Overall Rating may be used as a guide for assigning the Overall Performance rating.

Step Three – Meet with the employee

- Hold the meeting in a private area without interruptions
- Review the position description with the employee to determine if change is required and to ensure employee understands duties and performance standards
- Discuss employee’s self-appraisal
- Review the evaluation prepared by you, the employee’s supervisor
- Establish mutually agreed upon goals and objectives for the next evaluation period
- Inform employee that you will incorporate any agreed upon changes to the evaluation and forward the evaluation through Tarleton Connection to the employee for review and certification.
 - Employee’s certification does not indicate agreement with the evaluation
 - Employee can attach comments to the evaluation
- Remind the employee the evaluation will be available to them on-line through Tarleton Connection under Historical Evaluations after it is approved.

Performance Evaluations and Position Descriptions must be completed and approved by the end of May.

Step Four – Post Evaluation Meeting Actions

- Forward the evaluation to the employee for certification.
- Initiate a Position Description Update in Tarleton Connection if changes to the position description are required.