



Why evaluate performance?

The purpose of the performance review is to recognize individual accomplishments from the past year, develop goals for the upcoming year, review performance expectations and opportunities for improvement of the individual.

3 performance sessions must be documented:

- 1. Planning Session is held between supervisor/employee at beginning of review cycle to review performance expectations and goals for upcoming year.
a. Sections 5 and 6 to be completed and agreed upon by employee & supervisor.
2. Mid-Year Check-In is held between supervisor/employee at middle of review cycle to review progress of performance expectations and goals.
3. Year-End Summary Evaluation/Review is held between supervisor/employee at end of review cycle to review performance ratings and results.

PERFORMANCE REVIEW form with fields for Employee Name, Job Title, Report Period, Position Description, and performance categories like Work Performance, Communication & Working Relations, etc.

Which employee am I evaluating? Fill in the blank fields. Check appropriate box.

How was this employee's behavior? Identify what this person did that exemplified the right behavior/attitude.

4 performance rating definitions to be used for consistency on overall rating:

- EX = Exceptional: Performance far exceeded expectations due to exceptionally high quality and/or quantity of work.
EE = Exceeds Expectations: Performance is consistently above the work standard.
ME = Meets Expectations: Performance is solid & consistently completes job tasks expected in terms of quality and schedule.
NI = Needs Improvement: Performance is below minimum job requirements.



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PERFORMANCE REVIEW

Special Projects
Identify work on special projects, committees or shared governance, if applicable.

OVERALL COMMENTS (required):

SECTION 2 – EID COMPETENCIES
(Required for managers/supervisors, optional for others)

	NI	ME	EE	EX
Engagement <ul style="list-style-type: none"> Provides strong and effective leadership to ensure that work unit is high performing and achieves its mission. Creates a positive climate by setting clear strategy goals and expectations. Honors FP&M and Department core values. Provides regular feedback and support. Rewards performance. Supports and assists employees in learning and development. 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inclusion <ul style="list-style-type: none"> Fosters a welcoming and inclusive work environment. 				
Diversity <ul style="list-style-type: none"> Creates and supports recruitment, selection and onboarding processes that contribute to workforce diversity. 				

OVERALL COMMENTS (required):

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Why comment?
Effective performance management requires supervisors/managers to communicate expectations, recognize high performance and address issues.

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SECTION 4 – PERFORMANCE EXPECTATIONS SPECIFIC TO POSITION

Using position description, identify a minimum of four (4) key performance expectations:

	NI	ME	EE	EX	Comments:
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

SECTION 5 – GOALS SPECIFIC TO POSITION

Identify a minimum of four (4) goals:	Update/results:

SECTION 6 – GOALS SPECIFIC TO INDIVIDUAL - TRAINING, DEVELOPMENTAL, CAREER GROWTH

Identify a minimum of two (2) goals:	Update/results:

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What were this employee's accomplishments?
Using employee's position description as a guide, rate key performance expectations and write comments.

Set goals for the upcoming performance year.
Use Section 5 to set goals for the next 12 months.
Use Section 6 to identify long-term goals and career aspirations of this employee.



What is a signature sheet?

The FP&M Performance Review form itself can be completed electronically. However, use the hard-copy signature sheet to collect signatures during three separate performance management sessions.

PERFORMANCE REVIEW (Signature Sheet) form with sections: PLANNING SESSION, MID-YEAR CHECK-IN, YEAR-END SUMMARY EVALUATION / REVIEW. Includes fields for employee and supervisor names, signatures, dates, and performance ratings.

4 steps to follow during Year-End Summary Evaluation/ Review:

- 1. Get the PDF fillable FP&M Performance Review form (via email or website).
2. Fill in the blank fields and check appropriate box under applicable sections (Sections 1 -4).
3. Schedule a one-to-one meeting with an employee.
4. Sign the signature sheet under 'YEAR END SUMMARY EVALUATION / RESULTS SESSION,' make two copies of the form, keep one for your file and submit the other to FP&M HR.

4 steps to follow during Planning session:

- 1. Schedule a separate or during the Year-End Summary Evaluation/Review session, plan goals for upcoming year.
2. Get a blank PDF fillable FP&M Performance Review form (via email or website).
3. Fill in the blank fields under Sections 5 and 6.
4. Sign the signature sheet under 'PLANNING SESSION.'

2 steps to follow during Mid-Year Check-In:

- 1. Schedule a Mid-Year Check-In session with the employee and give mid-year feedback approximately midway through the performance year.
2. Sign the signature sheet under 'MID-YEAR CHECK-IN' and keep it in your file.