Guidelines for Preparing Annual Performance Evaluations For University of Idaho Exempt Administrators, Managers, and Supervisors

PLEASE NOTE: Text and Check Box Form Fields have been included for your convenience. If you prefer to enter your ratings and comments on the computer (prior to printing), simply go to the appropriate field and enter the data. Otherwise you may print a copy and fill-in by hand.

1. Distribute copies: Send PDF copy of signed evaluation to Human Resources via the shared drive space appropriate to your college/unit; copy to employee; copy to supervisor for department file. Please include a copy of the University of Idaho job description if employees’ job responsibilities have changed.

**Purpose**

Performance evaluation of exempt administrators, managers, and supervisors fulfills the same purposes as performance evaluation of all employees, but with an added focus on the manager's ability to accomplish institutional objectives through the efforts of others. For management employees, performance evaluation:

1. Appraises performance during the evaluation period relative to achieving goals of the administrative unit in a context of commitment to stewardship, quality and service;
2. Identifies areas needing improvement;
3. Provides documentation for rewarding meritorious performance;
4. Provides a basis for personnel actions;
5. Records goals for administrators, managers, and supervisors and their management units;
6. Ensures communications between the administrator, manager, or supervisor being evaluated and that employee's supervisor.

**Guiding Principles**

1. The administrative performance evaluation system addresses goal attainment and administrative, management, or supervisory skills.
2. Performance evaluation is an ongoing process. Regular meetings throughout the year should be conducted between the exempt administrator, manager or supervisor and his or her supervisor to review performance and develop and refine the unit's goals and objectives.
3. The annual evaluation should be cumulative for the period being appraised, should be conducted prior to development of salary recommendations for the following contract period, and should consider all aspects of performance.
4. Salary increases and professional development opportunities shall be correlated with goal attainment and annual overall ratings reflected on performance evaluations.
5. Administrators, managers and supervisors are expected to complete or to ensure that annual performance evaluations are completed for all employees in their units.

**Rating Scale**

1. The rating scale facilitates comparison of actual performance with potential performance in the opinion of the evaluator.
2. The following standard is used on the evaluation form:

   **OUTSTANDING (4):** The employee has demonstrated leadership qualities and performance equal to the greatest demands and expectations of this category and often takes on duties broader than the position requires. An explanation in the comments column is required.

   **EXCEEDS REQUIREMENTS (3):** The employee has demonstrated ability to capably perform the more difficult or unusual aspects of the requirement within this category with minimal guidance.

   **MEETS REQUIREMENTS (2):** The employee meets expectations in this category and performs effectively.

   **NEEDS IMPROVEMENT (1):** Performance comes close to meeting requirements of this category, but the need for further development is recognizable. Narrative comments should be included to adequately explain the rating and a plan should be implemented for future improvement.

   **UNSATISFACTORY (0):** The employee is not meeting expectations in this category at this time and significant improvement is needed. Narrative comments should be used to explain the rating and a plan should be implemented for future improvement.

The annual performance evaluation form for exempt administrators, managers, and supervisors includes six sections. The purpose of each section is explained below:
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Part I: Meets Organizational Goals and Objectives

1. Goals for the individual administrator, manager, or supervisor are expected to be based on goals for the management unit, goals for the unit are expected to be based on goals for the division, and goals for the division advance the university's mission and reflect institutional planning.
2. Goals for each management unit are expected to be a combination of assignments and self-initiated activities approved by the administrator's supervisor.
3. Each division will use its own goal-setting and goal-attainment tracking system.

Part II: Administrative Skills

1. This section provides the opportunity to evaluate specific individual components of administration and management, facilitating consideration of the entire range of skills necessary to successfully direct an administrative unit.
2. Specific components not applicable to the responsibilities of a particular administrator or manager may be omitted, with explanation.

Part III: Narrative

The narrative section should be used to:

1. Provide additional explanation regarding the administrator's management skills in carrying out general or routine undertakings;
2. Describe noticeable improvement in or deterioration of performance, as well as performance above and beyond the call of duty;
3. Elaborate on any part of the performance evaluation or overall rating, with particular emphasis on service and quality management.

Part IV: Overall Rating

1. The overall rating of performance should reflect the entire evaluation period.
2. Because the overall degree to which the administrator or manager meets organizational goals and objectives carries greater weight than is assigned to individual administrative or management skills, and because the various skills may not be equally relevant to successful performance of a particular administrative or management position, the overall rating need not be an arithmetic average of ratings in Parts I and II. Explanation should be provided if the overall rating is inconsistent with the arithmetic average.
3. Salary enhancements will be linked to the annual overall rating received by the administrator or manager.

Part V: Employee Comments

This section provides the exempt administrator, manager, or supervisor being evaluated the opportunity to respond to the evaluation, to articulate intentions for goal-setting and plans for improving performance and raising appraisal ratings, and to comment on ways in which the administrator, manager or supervisor believes his or her supervisor can help him or her grow professionally and manage more effectively.

Part VI: Signatures

The exempt administrative, managerial, or supervisory employee, the employee's supervisor, and the supervisor's supervisor (when applicable) should each sign the performance evaluation. The exempt employee's signature indicates that the evaluation has been reviewed with the employee, and does not necessarily indicate agreement with the supervisor's appraisal.

Part VI: Goal Setting

Please use this section to list several job-related employee goals for the upcoming evaluation period. It is a good idea for the supervisor and the employee to review progress toward goals on a regular basis.