

Supervisory Form Instructions

The objectives of the performance evaluation are:

1. To increase the effectiveness of each employee and overall department success in meeting the institution's strategic goals.
2. To increase employee awareness of professional strengths and weaknesses.
3. To identify opportunities for personal and professional growth.

The evaluation form consists of seven sections which include:

**Section I – Employee Information**

**Section II – Performance Evaluation** – This section assists the supervisor in evaluating employee performance. Scores are collected from two parts:

**Part A -- Yearly Goals and Projects** -- An updated job description is the basis for establishing performance expectations in this section. A minimum of three goals/projects/objectives need to be listed and 15 maximum.

**\*\* Goals/projects/objectives are aligned to the following institutional goals/strategies:**

**Administration:** Create top-10 HSC devoted to developing knowledge & educating professionals

**Academic Affairs:** Create knowledge, scientists & healthcare professionals devoted to meeting needs of Texans & nation

**Research:** Be leading HSC devoted to collaborative & translational research focused on needs of Texans & nation

**Clinical Care:** Be preeminent multispecialty medical practice & health care partner of choice in our communities

**Community Engagement:** Create & maintain partnerships with internal & external communities to meet institutional goals

**Part B -- Professional Behavior & Job Performance Factors** – An assessment of how well an employee accomplishes the job and meets the needs of customers and the institution.

**Part C -- Managerial Skills** – An evaluation of how well employee manages institutional resources and leads their team.

**\*\*\* Comments are required for each evaluation factor \*\*\***

**Section III -- Performance Evaluation Score** – A formula is embedded in the document to calculate the final evaluation score which is based on the three parts in section II.

Part A is weighted at 50%      Part B is weighted at 20%      Part C is weighted at 30%

**\*\* Supervisors are able to review the scores for each part. \*\***

**Section IV -- Areas of Development** – This section allows supervisors and employees to look at areas of strength as well as areas that need attention in order to reach greater job success.

**Section V -- New Goals and Projects for the Upcoming Year** – An important component of the evaluation process is to set goals and identify projects for the upcoming year. This section becomes the start of Part A for the upcoming year and provides both the supervisor and employee direction and focus after the evaluation meeting. The employee reviews his/her job description and lists objectives to be accomplished during the rating period. Objectives should conform to specific job requirements, professional development, and relate to the institution's strategic plan.

**Section VI -- Employee Comments (May include any desires for Career Growth and Development)** – Here employees are able to include comments that they feel pertain to this evaluation.

**Section VII -- Performance Evaluation Signatures**

Supervisory Process Overview

- Step 1 -- Employee and supervisor meet to review the job description and the specific goals, tasks, duties and projects that were identified in the previous evaluation. For Classified employees all essential job duties should be listed in Section II under Specific Goal/Project/Objective.
- Step 2 -- Employee is provided with a blank performance evaluation form to complete his/her self-evaluation. Employee provides completed form to supervisor (by timeframe established by supervisor) to review and incorporate as appropriate.
- Step 3 -- Supervisor completes the performance evaluation form.
- Step 4 -- Supervisor reviews performance evaluation with employee and provides feedback and comments.
- Step 5 -- Employee and supervisor discuss the Performance Evaluation, agree to goals for the following year (Section V) and identify development and career interests (Section IV & VI).
- Step 6 -- Employee has 15 business days to respond with written feedback or additional comments (Section IV).
- Step 7 -- Supervisor and employee sign completed performance evaluation and set-up a follow-up feedback session (HRS recommends a 6-month feedback and review session – supervisors are encouraged to meet more often as needed or if time allows).

## University of North Texas Health Science Center Staff Performance Evaluation

### Staff Evaluation Rating Scale

**\* 5 -- Highly Accomplished:** Employee consistently and significantly exceeds performance objectives and makes significant contributions well beyond normal job responsibilities. Exceptional performance on a consistent basis. Performance at this level is unique and rarely attained. Individuals in this category perform to maximum levels of effort. Little, if any opportunity remains for individuals in this category to improve performance level or extent of contribution. Typically, individuals in this category are innovative adding something new to the department and the Institution in a significant way.

**\* 4 -- Exceeds Requirements:** Exceeds performance objectives on a regular basis; errors are infrequent and are typically detected and corrected by the employee. Individuals are creative problem solvers implementing new ways of working or processing information to make a positive change. Requires little direction or supervision. Individuals in this category exhibit a high degree of excellence in accomplishing department goals beyond the expected job requirements. Individual does advanced planning, anticipates problems, and takes appropriate action.

**\* 3 -- Proficient / Meets Requirements:** Individuals in this category meet requirements of the position and perform in a fully satisfactory and reliable manner. Performance in this category is defined as meeting expectations where performance is consistent, resulting in a regular, ongoing achievement of the established standards for the position. Individuals in this category contribute to the goals of the department to achieve success.

**\* 2 -- Developing / Needs Improvement:** Individuals in this category inconsistently meet established norms and standards for the position. Individuals meet some of the minimum requirements of the position, but may need to improve performance in other areas. Sustained improvement is required for individuals in this category. Supervisors of individuals in this category should be communicating and partnering with the employee to improve knowledge and skills to meet performance expectations. Rating may also be appropriate for recently assigned tasks, since employee may still be learning.

**\* 1 -- Unsatisfactory:** Deficient performance; rarely meets expectations. Performance at this level is clearly unacceptable and cannot continue. Individuals in this category have not met established norms and standards for the position. Individual does not meet an acceptable number of the minimum requirements of the position and consistently fails to meet the established standards and goals for the position. Supervisors of staff in this category should be communicating and partnering with Human Resources.

\* -- Documentation/Support must be provided for all ratings.

# University of North Texas Health Science Center Staff Performance Evaluation Form

## Section I -- Employee Information

Employee Name:		Position Title:	
Employee ID:		Position ID:	
Supervisor:		Evaluation Review Date:	
Department:			

## Section II – Performance Evaluation

## Part A – Yearly Goals and Projects

[illegible]

Part A – Yearly Goals and Projects			
Specific Goal/ Project/ Objective	Demonstrated Behavior & Success Factors	Institutional Goal/Strategy Supported	Rating

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<b>Part B -- Professional Behavior &amp; Job Performance Factors</b>	
<b>Professional Behavior &amp; Job Performance Factors</b>	<b>Rating</b>
<p><b>1. Dependability &amp; Professionalism</b> – Unquestioned principle and behavior. Treats all employees and customers with respect and dignity. Exhibits tact and sincerity when working with others to achieve objectives. Conscientious effort in performing work in a productive and timely manner. High commitment level to work time frames/schedules. Works independently and responds appropriately to instructions and procedures.</p>	
<b>Comments:</b>	
<p><b>2. Teamwork</b> – Commitment to others in department. Integrates own activities with larger group. Readily gives and receives help. Values contributions made by others. Actively seeks and achieves group participation to improve objectives and solve problems. Is a productive team member, participating in discussions, adding knowledge to the team, and following through on group assignments in a timely manner.</p>	
<b>Comments:</b>	
<p><b>3. Customer Service</b> – Anticipates, listens to, understands, and responds to customer needs (internal and external). Reacts to questions and issues with an attitude of support and problem-solving. Delivers work product and services to customers in a pleasant manner, which reflects positively on the department and the institution.</p>	
<b>Comments:</b>	
<p><b>4. Effective Communication</b> – Open, honest, and accurate communication. Expresses ideas and information in writing and verbally in an effective manner that is thorough, clear, concise, and complete. Conveys information to supervisors, peers, and customers in a timely manner. Listens to others and is open to feedback and suggestions from others.</p>	
<b>Comments:</b>	

<b>5. Initiative &amp; Creativity</b> – Solves problems and designs procedures that are resourceful and creative. Willing to take risks for the quality and effectiveness of the department and institution. Looks for ways to do things better. Self-starter. Encourages and fosters the development of new approaches and methods.	
<b>Comments:</b>	
<b>6. Job Competency &amp; On-Going Skills Development</b> -- Demonstrates expertise in job responsibilities with a high level of skill and knowledge. Is able to handle complex responsibilities/projects. Stays current on department and institution policies, procedures, and guidelines. Provides necessary follow through to get things done efficiently. Exhibits high degree of quality in responsibilities/projects. Displays an interest in and takes initiative to maintain current skills and continuously upgrades skills to meet changing requirements for position.	
<b>Comments:</b>	
<b>7. Judgment &amp; Decision Making</b> – Weighs and evaluates information, able to prioritize tasks, assesses probable consequences and takes appropriate action. Demonstrates the ability to make sound and timely decisions, and include appropriate people in the decision-making process. Selects decision alternatives that meet the objectives of the department and institution.	
<b>Comments:</b>	
<b>8. Compliance</b> – Demonstrates compliance with all applicable policies, regulations, and laws in job performance. Please include comments on any non-compliance with any applicable laws, regulations and/or policies (UNT System & UNTHSC), state, federal laws and regulations and any associated remedial-corrective action, such as training and/or disciplinary actions.	
<b>Comments:</b>	
<div style="display: flex; justify-content: flex-end; align-items: center; padding-right: 10px;"> <div style="border: 1px solid black; padding: 5px 10px;"><b>Part B Score</b></div> <div style="border: 1px solid black; width: 100px; height: 40px; margin-left: 10px;"></div> </div>	



Part C -- Managerial Skills (Complete <b>ONLY</b> for those who supervise employees)	
Managerial Skills	Rating
<p><b>1. Leadership</b> –Vision for the work unit/department/institution that is in alignment with Institutional goals and strategies. Effectively communicates a shared purpose, builds trust among employees and with peers. Takes action to realize goals and objectives. Motivates others to develop and enhance operations and services.</p> <p><b>Comments:</b></p>	
<p><b>2. Performance Management</b> – Ensures completion of timely, annual performance reviews with employees. Actively supports equal opportunity, diversity and cultural unity. Develops mutual trust and respect; maintains cohesive, supportive, and productive work environment. Develops employees through on-going coaching, counseling and training. Selects highly accomplished employees for advancement potential and minimizes turnover.</p> <p><b>Comments:</b></p>	
<p><b>3. Budget Consciousness</b> – Maintains an awareness of budgets and expenses as appropriate. Controls funds to ensure all expenses are within approved budget. Effectively manages resources, supplies, equipment, overtime and/or other typical fiscal components</p> <p><b>Comments:</b></p>	
<p><b>Part C Score</b></p>	

**Section III - Performance Evaluation Score**

Total Scores: (Part A – 50%    Part B – 20%    Part C – 30%)

**Section IV -- Areas of Development**

What areas of strength were identified?

What skills/knowledge/behavior would lead to greater success and improvement?

Section V -- New Goals and Projects for the Upcoming Year	
Specific Goal/ Project/ Objective	Institutional Goal/Strategy Supported

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Specific Goal/ Project/ Objective	Institutional Goal/Strategy Supported

<b>Section VI -- Employee Comments (May include any desires for Career Growth and Development)</b>
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<b>Section VII -- Performance Evaluation Signatures</b>
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<b>Employee Signature</b>	<b>Date</b>
<b>Supervisor's Signature</b>	<b>Date</b>
<b>Department Chair/Head</b>	<b>Date</b>
<b>Human Resource Services Representative</b>	<b>Date</b>
<b>** Employee signature acknowledges receipt of completed evaluation: it does not necessarily indicate agreement. **</b>	