

# UHCL Performance Assessment – Short Form

Employee Name \_\_\_\_\_  
 Department \_\_\_\_\_  
 Employee ID \_\_\_\_\_

Title \_\_\_\_\_  
 Supervisor Name \_\_\_\_\_  
 Period Assessed \_\_\_\_\_

The UHCL Performance Assessment should be completed annually for all benefits eligible employees within 30 days of the employee’s anniversary date. The employee’s position description should reviewed and updated if necessary at the time of assessment.

This version of the performance assessment may be used if **all of the following conditions are met:**

- Employee has been in the same role and has completed the full form two times in this role;
- Employee and current reviewer/supervisor have completed the full assessment form **together** for at least 2 previous review periods.
- Employee has received a rating of “Meets Expectations” or “Exceeds Expectations” for at least the last 2 review periods.
- Employee’s performance meets or exceeds expectations.

## **Section I: REVIEW GOALS SET FOR CURRENT ASSESSMENT PERIOD**

List the goals that the employee set to be accomplished during this calendar year. Indicate status and make optional comments.

GOAL	STATUS	COMMENTS
	Complete      Delayed Incomplete      Cancelled	
	Complete      Delayed Incomplete      Cancelled	
	Complete      Delayed Incomplete      Cancelled	
	Complete      Delayed Incomplete      Cancelled	
	Complete      Delayed Incomplete      Cancelled	

## **Section II: FACTORS AND ELEMENTS**

The UHCL performance competencies have been consolidated into three major categories for this version of the performance assessment. Please rate the employee and make comments for the three performance categories.

For each, indicate assessed performance over the past 12 months as **Meets Expectations** – “ME” or **Exceeds Expectations** – “EX.”

Ratings of “Exceeds Expectations” or “Needs Improvement” require comments from the supervisor.

<p><b>JOB KNOWLEDGE AND WORK PRODUCT</b> (Job knowledge, quality/integrity, reliability/organization)</p> <p>Is fully competent in all aspects of role; work is accurate and detailed; is solution-focused; demonstrates ethical behavior; is committed to quality of work and results; follows policies and procedures of university and department; can prioritize work and schedule hours/leave effectively to complete tasks and projects</p>	<p><b>RATING:</b> <span style="float: right;"><b>ME</b> <b>EX</b></span></p> <p><b>COMMENTS</b></p>
<p><b>INTERPERSONAL COMMUNICATION</b> (Teamwork/attitude, communication, leadership)</p> <p>Effectively communicates with coworkers at all levels; treats others with respect; focuses efforts on the needs of the team; represents ideals and policies of the university and department; keeps stakeholders in the loop on project/task status and/or setbacks; sets an example for a positive university culture</p>	<p><b>RATING:</b> <span style="float: right;"><b>ME</b> <b>EX</b></span></p> <p><b>COMMENTS</b></p>
<p><b>CUSTOMER SERVICE</b></p> <p>Treats customers with courtesy and professionalism; identifies, understands and responds to needs of customers quickly; keeps customers informed and follows through to conclusion; takes personal responsibility for dealing with or correcting issues and concerns</p>	<p><b>RATING:</b> <span style="float: right;"><b>ME</b> <b>EX</b></span></p> <p><b>COMMENTS</b></p>

**Section III: SPECIAL RECOGNITION**

This space provides the opportunity to comment on individual achievement **above and beyond** role requirements. These can include awards received, exceeding customer expectations, etc.

**Section IV: PLANS FOR TRAINING AND DEVELOPMENT**

List any training items for the coming year to aid in development for current or future roles.

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**Section V: FACTORS AND ELEMENTS SPECIFIC TO SUPERVISORS**

For each of the additional competencies for Supervisors, indicate assessed performance over the past 12 months as **Meets Expectations** – “ME” or **Exceeds Expectations** – “EX.” Ratings of “EX” require comments from the supervisor.

<p><b>STAFF DEVELOPMENT</b></p> <p>Consider how well this supervisor promotes the personal and professional growth of staff. Consider how well responsibility and authority are delegated to promote productivity.</p>	<p><b>BUSINESS PLANNING AND PRACTICES</b></p> <p>Consider the supervisor's ability to plan, utilize resources (e.g., time, money, facilities, or employees' skills) and accomplish objectives, as well as commitment to good business practices and controls.</p>
<p><b>RATING:</b>                      <b>ME</b>                      <b>EX</b></p>	<p><b>RATING:</b>                      <b>ME</b>                      <b>EX</b></p>
<p><b>COMMENTS</b></p>	<p><b>COMMENTS</b></p>

**Section VI: GOALS FOR THE COMING ASSESSMENT PERIOD**

The employee and supervisor should agree on performance goals for the coming assessment period. It is recommended that employees set 3-5 goals for each assessment period. While planning goals for the next assessment period, incorporate factors/elements that are critical for development, changing job requirements and/or career growth.

- Under the “Goal” section, indicate what it is that will be accomplished.
- In the “Action Items” section, indicate the step goals or actions the employee will need to take in order to accomplish this goal.

<p><b>GOAL</b></p>	<p><b>ACTION ITEMS</b></p>

**Section VII: COMMENTS AND SIGNATURES**

SUPERVISOR COMMENTS:	EMPLOYEE COMMENTS:

**SIGNATURES: MUST BE COMPLETED BEFORE SUBMISSION TO HUMAN RESOURCES**

\_\_\_\_\_  
Date of assessment meeting

\_\_\_\_\_  
Employee

\_\_\_\_\_  
Date

\_\_\_\_\_  
Supervisor

\_\_\_\_\_  
Date

\_\_\_\_\_  
Department Head

\_\_\_\_\_  
Date