



University  
of Houston  
Clear Lake

Human Resources

## Annual Staff Performance Evaluation

September 1, 2021 – August 31, 2022

### Employee Information

Name: \_\_\_\_\_

Employee ID: \_\_\_\_\_

Job Title: \_\_\_\_\_

Department: \_\_\_\_\_

Manager's Name: \_\_\_\_\_

Manager's Title: \_\_\_\_\_

### Important note regarding Unsatisfactory performance:

The intent of this form is not to introduce unsatisfactory performance. Unsatisfactory performance must be addressed through ongoing Performance Management independent of the Performance Assessment process and form. Unsatisfactory performance requires significant improvement in job skills, ability, and/or performance. Employees who are reluctant or unable to meet expectations of job factor requirements in the performance of job duties and responsibilities are subject to further disciplinary action up to and including, termination of employment.

### Job Factor Rating

Please review each Job Factor and identify the employee's level of positive contribution or improvement needed in that area. Use the rating below to score each factor.

### Rating Scale:

- **Needs Improvement**
  - Does not consistently meet expectations of job factor requirements in the performance of job duties and responsibilities. Some improvement is needed in job skills, ability, and/or performance.
  - Performance Assessments with **two or more** factors with a rating of 'Needs Improvement' are subject to further review by Human Resources and may result in further developmental action.
- **Meets Expectations**
  - Consistently fulfills job factor requirements in the performance of job duties and responsibilities.
- **Exceeds Expectations**
  - Frequently exceeds some of the job factor requirements in the performance of job duties and responsibilities.

Manager comments are **required** for all job factors. Additionally, any job factor with a rating of '**Needs Improvement**' or '**Exceeds Expectations**' must also include a minimum of **two examples** that support the rating.

Name: \_\_\_\_\_

Employee ID: \_\_\_\_\_

**Job Factors** *(add attachment if comments and examples extend past space provided)*

<p><b>JOB PERFORMANCE</b></p> <p>Demonstrates knowledge of all aspects of the position; understands impact of the work on others; strives to develop and improve job skills; seeks out new job-relevant information. Work is consistently thorough and accurate; pays attention to detail; identifies problems and follows through to solutions.</p>	<p><b>RATING</b></p> <p><input type="checkbox"/> Needs Improvement</p> <p><input type="checkbox"/> Meets Expectations</p> <p><input type="checkbox"/> Exceeds Expectations</p>
<p><b>COMMENTS AND EXAMPLES</b></p>	

<p><b>INTEGRITY</b></p> <p>Consistently thorough and accurate; meets or exceeds acceptable standards; pays attention to detail; produces services or output that reflect careful and conscientious effort; identifies problems and follows through to solutions; follows policies and procedures of university and department; demonstrates ethical behavior in all actions.</p>	<p><b>RATING</b></p> <p><input type="checkbox"/> Needs Improvement</p> <p><input type="checkbox"/> Meets Expectations</p> <p><input type="checkbox"/> Exceeds Expectations</p>
<p><b>COMMENTS AND EXAMPLES</b></p>	

<p><b>COMMUNICATION</b></p> <p>Conveys information clearly; communicates effectively with people at all levels; notifies others promptly of delays and problems; gathers and gives relevant information to others in a timely manner; gives specific, timely feedback; actively shares knowledge and ideas with others; effectively handles difficult interpersonal relationships; keeps stakeholders informed; sets an example for a positive university culture.</p>	<p><b>RATING</b></p> <p><input type="checkbox"/> Needs Improvement</p> <p><input type="checkbox"/> Meets Expectations</p> <p><input type="checkbox"/> Exceeds Expectations</p>
<p><b>COMMENTS AND EXAMPLES</b></p>	

Name: \_\_\_\_\_

Employee ID: \_\_\_\_\_

<b>CUSTOMER SERVICE</b> 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.	<b>RATING</b> <input type="checkbox"/> Needs Improvement <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Exceeds Expectations
<b>COMMENTS AND EXAMPLES</b>	

**Job Factors specific to Supervisors** (do not complete if employee is not a Supervisor)

<b>WORKFORCE AND RESOURCE PLANNING</b> Consider the supervisor's ability to plan, utilize resources (e.g., time, money, facilities, materials, equipment, or employees' skills) and accomplish objectives. Consider how well this supervisor promotes the personal and professional growth of staff.	<b>RATING</b> <input type="checkbox"/> Needs Improvement <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Exceeds Expectations
<b>COMMENTS AND EXAMPLES</b>	

<b>BUSINESS PRACTICES</b> Consider the supervisor's demonstrated commitment to internal controls including support of sound financial conditions of the administrative unit, overall good business practice, and segregation of duties.	<b>RATING</b> <input type="checkbox"/> Needs Improvement <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Exceeds Expectations
<b>COMMENTS AND EXAMPLES</b>	

Name: \_\_\_\_\_

Employee ID: \_\_\_\_\_

**Goal Status** (September 1<sup>st</sup> of previous year – August 31<sup>st</sup> of current year)

GOAL	STATUS	COMMENTS
	<input type="checkbox"/> Complete <input type="checkbox"/> Incomplete – some progress made <input type="checkbox"/> Incomplete – no progress <input type="checkbox"/> Cancelled	
	<input type="checkbox"/> Complete <input type="checkbox"/> Incomplete – some progress made <input type="checkbox"/> Incomplete – no progress <input type="checkbox"/> Cancelled	
	<input type="checkbox"/> Complete <input type="checkbox"/> Incomplete – some progress made <input type="checkbox"/> Incomplete – no progress <input type="checkbox"/> Cancelled	
	<input type="checkbox"/> Complete <input type="checkbox"/> Incomplete – some progress made <input type="checkbox"/> Incomplete – no progress <input type="checkbox"/> Cancelled	

**Goals for the new assessment period** (a minimum of two goals are **required**)

The employee and supervisor should agree on performance goals for the coming 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. When applicable, add how this goal ties back to the [UHCL Strategic Plan](#).

- 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.
- Goals can have different **due dates** within the Fiscal Year

GOAL	DUE DATE	ACTION ITEMS

Name: \_\_\_\_\_

Employee ID: \_\_\_\_\_

### 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, exemplary performance in goal completion, special projects, involvement in campus committees, etc.

### Training and Development

Use this section to capture any training and/or development needs that the employee should pursue. These can be resources, topics, and opportunities that will provide them with the skill development needed to ensure ongoing growth and increasing contribution to their role.

Note: Anything listed in this section serve as recommendations only. **If completion of a course or development opportunity is required, please list it as a goal.**

Name: \_\_\_\_\_

Employee ID: \_\_\_\_\_

**Additional Comments:**

Supervisor Comments	Employee Comments

**Signatures:** (must be completed prior to submission to Human Resources)

All signatures are required. A signature does not constitute as agreement with the assessment but serves as confirmation that this meeting took place.

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

\_\_\_\_\_  
Employee

\_\_\_\_\_  
Date Signed

\_\_\_\_\_  
Supervisor

\_\_\_\_\_  
Date Signed