



Overview of Performance Appraisal Process:

1. The supervisor will provide the employee with a list of key responsibilities from the previous year's performance appraisal. The employee and supervisor should review this list to make sure it is accurate, as job duties may evolve over the course of employment.
2. The supervisor will complete the appraisal form, giving a rating and supporting comments for each of the employee's key responsibilities. The supervisor will then give the employee an overall rating and provide a summary of the employee's overall performance, including areas that need improvement and a Performance Action Plan, if necessary.
3. The supervisor provides copy of completed appraisal to the employee to read and review prior to a scheduled meeting.
4. The employee and supervisor meet and discuss appraisal. For employees that meet or exceed expectations, a development plan for the coming year is discussed. For employees who do not meet expectations, a performance action plan is discussed.
5. The supervisor signs the appraisal.
6. The employee may elect to provide comments to the appraisal and then signs and dates the appraisal.
7. The signed appraisal is sent to department head for review and signature.
8. The completed appraisal is filed in the employee's personnel file. A copy of the final, signed evaluation is sent to the Liberal Arts Human Resources office and a copy is given to the employee.

Definitions of Ratings:

- **Exceeds Expectations** should be used when an individual consistently performs above expectations and goes beyond the requirements of the position relative to the organization's objectives and values.
- **Meets Expectations** means that the individual meets expectations relative to the organization's objectives and values. Overall performance is good and solid.
- **Does Not Meet Expectations** should be used when an individual's performance has not met expectations and improvement is required.

Timeframe for Evaluation. By May 31, the evaluator should complete the annual evaluation of each employee and discuss the evaluation with him or her. The evaluation should cover the time beginning in June of the previous year up to the present.

Merit recommendations. During the month of May the evaluator should also complete his/her recommendations for merit increases and review them with their supervisor. Funding for merit increases will vary from year to year and is subject to University guidelines. **Remember – employees who do not have a completed, signed evaluation on file, or employees who have an active Level 2 or 3 Reminder, are not eligible to receive merit increases.**

Liberal Arts Human Resource Representatives are available to answer questions and to provide assistance to supervisors on any aspect of the performance management process, including the Performance Evaluation form. They can be reached by phone at 232-2132 or 232-4820 or by e-mail at gaildavis@austin.utexas.edu or dona.kurtz@austin.utexas.edu.

Additional guidelines and tips for conducting an annual performance appraisal can be found at <http://www.utexas.edu/cola/hr/performanceEvalForm/>