

MANAGERIAL/CONFIDENTIAL EMPLOYEE EVALUATION GUIDELINES

The Managerial and Confidential Employee Evaluation forms consist of three sections:

Section 1 –Employee Self Evaluation

This section of the performance process is optional, but recommended by Labor Relations, to be completed by the employee and returned to the Manager. Although the review is primarily the responsibility of the Manager, the annual review is structured to enable staff to participate in the assessment of their job performance.

Section 2 - Supervisor's Evaluation

This section is to be completed by the Manager in direct supervision of the employee. The section includes rating areas that must be completed or marked "N/A" (not applicable). The real value of the review lies in the communication between manager and employee concerning what has been done well, and where further growth should be directed. Summarizing the performance, providing constructive feedback on strengths and weaknesses, identifying accomplishments, and specifying corrective action and avenues for professional growth are key managerial appraisal tasks.

Section 3 – Goals

This section documents the goals and expectations for the upcoming review cycle and is a part of the discussion process (see below). Goals should be (SMART) specific, measurable, attainable, relevant and time bound.

Preparing for and Conducting the Performance Evaluation:

- Review the expectations set at the start of employment which were communicated to the employee or if the employee is beyond the initial evaluation period, the expectations set at the beginning of the evaluation year. Ask yourself what the employee did well, what compliments can be given, what areas need improvement, what activities have reflected well or poorly on their performance, if the employee successfully met those expectations and what you would like to see the employee accomplish in the coming year.
- The rating form should be the culmination of the process that has been ongoing during the review period, and the final outcome should not come as a surprise to the employee.
- Meet with the employee and discuss the evaluation. The discussion should be private and touch upon the activities of the past rating year as well as goals for the upcoming rating period. The Manager should obtain the employee's signature on both sections–

Supervisor's Evaluation and Goals and provide the employee with a copy. The signature of the employee indicates that the evaluation was reviewed and does not necessarily indicate their agreement with the assessment. The original evaluation should be submitted to Human Resources. A copy should be provided to the employee and a copy should also be kept for the department file.

Unsatisfactory/Less than Good Performance Appraisals:

Before reviewing an "Unsatisfactory/Less than Good" performance appraisal with an employee, supervisors **must** review it with Labor Relations, laborrelations@uchc.edu.

- **Your review with Labor Relations should occur no later than June 7, 2024. Failure to review the unsatisfactory evaluation with Labor Relations by the deadline may result in the evaluation defaulting to satisfactory.**
- Labor Relations will be looking to ensure that supervisors have pointed out an employee's area(s) of weakness, counseled him or her regarding ways to correct the problem, and given the employee a chance to improve before issuing an "Unsatisfactory/Less than Good" performance appraisal.
- Appraisals that are rated as overall unsatisfactory require written justification and supporting documentation as described above.

Helpful Tips:

- Be specific – give specific examples of what the employee did to achieve --or fall short of --the goal.
- Be complete - write your evaluation so that an outsider reading it would be able to understand exactly what happened and why.
- Be consistent – apply your performance standards consistently across your team.

Evaluations should be scanned and emailed to hr-operations@uchc.edu as a PDF no later than Friday, June 28, 2024, close of business.

If you have general questions regarding the performance appraisal, please call Elizabeth Fay at efay@uchc.edu, 860-679-7573.

If you have performance issues that may result in an unsatisfactory evaluation, please contact Labor Relations, laborrelations@uchc.edu.