

Agency _____

SECTION 1 - EMPLOYEE IDENTIFICATION

Employee's Name _____

Division/Facility _____

Person Number: _____

Section _____

Title _____

Salary Grade _____ Item Number _____

Supervisor/Rater _____

Title _____

Reviewer _____

Title _____

Evaluation Period From: _____ To: _____
(mo./day/yr.) (mo./day/yr.)

SECTION 2 - PERFORMANCE PROGRAM

A. **TASKS/OBJECTIVES:** List the major tasks, assignments, activities, and results to be achieved during the evaluation period.

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____

B. **PERFORMANCE STANDARDS:** List observable criteria for determining if objectives/tasks are fully met/performed. Criteria should be quantitative whenever possible.

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____

Approved by: _____ Date: _____
(Reviewer)

SECTION 3 - CERTIFICATION

We have met to discuss the objectives, tasks, assignments and activities indicated above. This performance program is the basis upon which job performance will be appraised and rated on the annual rating date. The employee has had an opportunity to submit proposed tasks and standards for consideration in the performance program.

Supervisor _____ (Signature) _____ (Date)
Employee _____ (Signature) _____ (Date)

_____ I have attached written comments concerning the performance program (Optional on the part of the employee.)

SECTION 4 - SIX-MONTH RECERTIFICATION

We met within one month before or after the approximate midpoint of the rating period to discuss the employee's performance, and to reaffirm or revise the performance program. (If revised, changes have been reviewed and approved, and revisions are attached) If a rating were assigned today based upon service to date, I would propose that it be

_____ Satisfactory _____ Unsatisfactory (check one) This is not a rating; therefore, it is not appealable.

Supervisor _____ (Signature) _____ (Date)
Employee _____ (Signature) _____ (Date)

INSTRUCTIONS TO SUPERVISOR

A. At the start of the process:

1. Before beginning of the rating period, discuss prospective performance requirements with the employee, and seek the employee's input to the performance program by providing him/her with a "worksheet" and a reasonable deadline for its return to you. (Submission of a worksheet is optional on the part of the employee.)
2. Upon receipt of the employee's worksheet (or after the deadline for its return has passed), complete Section 1 - Employee Identification and Section 2 - Performance Program.
3. Submit performance program to reviewer (with employee's worksheet, if any) for approval.
4. Following approval by reviewer, notify the employee of a time for discussion of the performance program. This must occur within six weeks of the beginning of the rating period. At the appointed time, discuss performance program with employee, and complete Section 3 - Certification. Give copy to employee, retain a copy and submit original to Personnel Office.
5. If the employee wishes to attach additional written comments concerning the performance program, he/she may do so. This is also optional on the part of the employee.

B. At the approximate midpoint of the rating period:

1. Notify the employee of the date, time, and place for the six-month conference. (This conference should take place within one month before or after the midpoint of the rating period.)
2. At that time, meet with the employee and discuss his/her performance to date. Discuss the employee's progress in meeting performance standards, any accomplishments or deficiencies, and any training, development, and/or performance improvement activities which might assist the employee in meeting tasks/objectives. Advise the employee of the rating you would propose, if one were due at this time. If performance is less than "Satisfactory," advise the employee what he/she must do in the time remaining in order to achieve a final rating of "Satisfactory." Employee and supervisor must sign Section 4 - Recertification.

Note: If there are any revisions to the performance program which need to be made at this point, first obtain the approval of the reviewer, as you did at the start of the rating period. Then meet with the employee to discuss the revisions, provide the employee with a copy and retain a copy for yourself, and send the original to your Personnel Office. (Revised programs must show the reviewer approval by means of a signature and date.)

Revisions can be made at any time during the evaluation period, as long as this process is followed. However, there must be a reasonable amount of time remaining in the evaluation period for the employee to perform any new tasks or meet any new objectives.