|  |  |  |  |
| --- | --- | --- | --- |
| Employee Name:  | UNM ID:  | Org. Code:  | Department:  |
| Job Title:  | Supervisor Name: Supervisor UNM ID:  | Review Period:  | Review Date:  |
| Indicate Type of Review:  \_\_\_ Annual \_\_\_ Probationary/Trial \_\_\_Self-assessment \_\_\_Other:  | **2012 PERFORMANCE REVIEW** |

|  |
| --- |
| **Performance Review Tips****Plan:** * At the beginning of the review period, the employee and supervisor will set performance expectations for the review period.

**During the review period (January 1- December 31):*** Employees work toward the successful accomplishment and demonstration of the stated goals, duties, and the University Values.
* Supervisors provide specific coaching and mentoring as needed to assist the employee in achieving optimal performance.

**At the time of the written review:**Employee * Prepare a Self-Assessment.
* Evaluate performance by writing supporting comments that provide a balanced overview of goals/duties and University Values being reviewed.
* Review performance data, such as special accomplishments, achievements, or extenuating circumstances that have impacted success.

Supervisor * Prepare the written review.
* Complete the Supervisor Supporting Comments for sections II. Goals and Duties Section and section III. University Values.
* Rate employee performance related to goals, duties, and values using personal observations, notes, and information collected throughout the year. Do not rely only on the employee self-assessment.
* Assign a rating for each section II. Goal and Duty and section III. University Value.
* Review the employees required and job specific training.
* Assign an Overall Rating in section I. Overall Rating.
* Complete a written narrative summarizing the employee’s overall performance in section V. Summary.

 **Conduct the performance review discussion:**Supervisor * Meet with the employee to review, discuss, and confirm understanding of the employees accomplishments of goals/duties and demonstrated University Values
* Recognize strengths and achievements.
* Review status on improvement areas.
* Review the employee’s career development and develop goals and standards for the next review period.
* Finalize the written review. If, during the discussion, the supervisor changes any ratings, a final version of the form should be prepared. The employee and supervisor should meet again to review the final form.
* Sign and date the form.
* Send the signed Performance Review Form to Human Resources. Human Resources will place the review form in the employee’s personnel file.
 |
|
|
|
|

1. **Overall Rating (Place an ‘X’ next to the overall rating)**

|  |  |
| --- | --- |
| *Exceeds Expectations (E):* Employee performs job requirements and demonstrates University Values above expectations. Employee achieves performance expectations and frequently exceeds expectations. Employee significantly contributes to the success of the services and projects they support.*Meets Expectations (M):* Employee performs job requirements and demonstrated University Values consistently and fulfills expectations and periodically excels. Employee’s work is fully effective, reliable, and of good quality. *Improvement Needed (I):* Employee does not consistently perform job requirements or demonstrate University Values. Improvement is needed. | SupervisorOverallRating**\_\_ E** **\_\_ M** **\_\_ I**  |
|
|
|
|

1. **Goals and Duties (Place an ‘X’ next to the appropriate rating per goal/duty)**

*Best practices indicate employees who focus on 3-5 goals/duties have a higher success rate of achieving those goal/ duties.* At the beginning of the review period determine goals (e.g., specific projects, activities) or duties that will be accomplished during the review period.  *D*escribe how the employee accomplished their goals/duties and assign a rating for each. Use SMART goal criteria; Specific, Measurable, Achievable, Results-focused, and Time-bound when setting goals or tasks. [SMART-goals](http://hr.unm.edu/docs/eod/s-m-a-r-t-goals.docx)

|  |  |  |
| --- | --- | --- |
| **Goal/Duty:** | **Self-Rating****\_\_ E** **\_\_ M** **\_\_ I**  | **Supervisor****Rating****\_\_ E** **\_\_ M** **\_\_ I**  |
| **Goal/Duty:** | **\_\_ E** **\_\_ M** **\_\_ I**  | **\_\_ E** **\_\_ M** **\_\_ I**  |
| **Goal/Duty:**  | **\_\_ E** **\_\_ M** **\_\_ I**  | **\_\_ E** **\_\_ M** **\_\_ I** |
| **Goal/Duty:** | **\_\_ E** **\_\_ M** **\_\_ I**  | **\_\_ E** **\_\_ M** **\_\_ I**  |
| **Employee self-assessment: Please include examples regarding progress towards goals/duties:**  | **Supervisor supporting comments: Please include examples regarding progress towards goals/duties:**  |

1. **University Values (Place an ‘X’ next to the appropriate rating per UNM Value)**

|  |  |  |
| --- | --- | --- |
| **Excellence -** provides quality decisions and actions throughour people, programs, and outcomes. Examples of behavior include: 1) provide quality service to students, patients, colleagues and the public; 2) work effectively and productively as a team member; 3) produce high-quality results; 4) learn from mistakes; 5) promote a safe and healthy work environment; 6) display sense of ownership in supporting the overall mission and vision of the University.  | Self –Rating**\_\_ E** **\_\_ M** **\_\_ I**  | SupervisorRating**\_\_ E** **\_\_ M** **\_\_ I**  |
| **Access with Support to Succeed** - offers all who desire the opportunity to take full advantage of the wealth of UNM resources and be fully included in the UNM community. Examples of behavior include: 1) responsive to student needs; 2) contribute to an environment where all members can participate; 3) take advantage of opportunities to provide service to the department, the University, and the community as appropriate; 4) share knowledge and best practices by presenting at professional conferences, instructing classes, or mentoring others. | **\_\_ E** **\_\_ M** **\_\_ I**  | **\_\_ E** **\_\_ M** **\_\_ I**  |
| **Integrity -** manages our resources wisely, keep our promises, and ensure accountability to our students, the community, and all who serve UNM’s mission. Examples of behavior include: 1) consistently engage in work-related activity and make productive use of work time; 2) arrive to work on time, prudent in use of leave and adhere hence to leave policies; 3) accept responsibility and accountability for own actions; 4) maintain composure and demonstrate self-control in difficult situations; 5) demonstrate appropriate use of and respect for University property and equipment; 6) comply with work rules and UNM Policies and Procedures. | **\_\_ E** **\_\_ M** **\_\_ I**  | **\_\_ E** **\_\_ M** **\_\_ I**  |
| **Diversity** - strengthens our university, our community, and our society. Examples of behavior include: 1) treat all persons with respect and civility; 2) recognize and respect differences of culture, ethnicity, gender, sexual orientation, nationality, religion, language, and academic discipline; 3) value differences as a strength; 4) embrace diversity as a learning opportunity; 5) seek opportunities for inclusion to strengthen the University community. | **\_\_ E** **\_\_ M** **\_\_ I**  | **\_\_ E** **\_\_ M** **\_\_ I**  |
| **Respectful Relationships -** build trusts, inspire collaboration, and ensure teamwork essential to UNM’s success. Examples of behavior include: 1) work together to accomplish goals; 2) offer help to coworkers; 3) provide excellent customer service; 4) actively look for opportunities to partner with other departments; 5) manage conflict in a professional and productive manner; 6) utilize effective communication to inspire teamwork and partnerships | **\_\_ E** **\_\_ M** **\_\_ I**  | **\_\_ E** **\_\_ M** **\_\_ I**  |
| **Freedom -** encourages inquiry, candor, creative activity, and the pursuit of ideas.Examples of behavior include: 1) demonstrate an interest in learning; 2) keep current in field; 3) demonstrate open-mindedness toward people who hold differing opinions from one’s own; 4) take on member or leadership roles in professional organizations; 5) encourage others to pursue learning. | **\_\_ E** **\_\_ M** **\_\_ I**  | **\_\_ E** **\_\_ M** **\_\_ I**  |
| **Sustainability -** meets the needs of the present while preserving the well being of future generations.Examples of behavior include: 1) reduce energy and water usage by turning off lights, faucets, and equipment when not in use; 2) reuse materials and supplies to reduce waste; 3) recycle whenever possible, re-thinking habits to purchase only when necessary; 4) purchase/use environmentally friendly products and equipment; 5) actively participate in or promote UNM sustainability efforts.  | **\_\_ E** **\_\_ M** **\_\_ I**  | **\_\_ E** **\_\_ M** **\_\_ I**  |
| **Employee self-assessment: Please include examples regarding behaviors that exemplify University values:**  | **Supervisor supporting comments: Please include examples regarding behaviors that exemplify University values:**  |

1. **Required and Job Specific Training**

The University is committed to ongoing development for employees. Use this section to track compliance with required and job specific training.

|  |  |  |  |
| --- | --- | --- | --- |
| **University Required Training** | **Date Complete** | **Job Specific Training** Based on your University job position, list additional training required to perform your job duties. Examples may include (Securing Private Data, Banner, I-9, Accurate Time Reporting, New Manager Orientation, Conferences, Seminars) | **Date Complete** |
| Preventing Sexual Harassment |  |  |  |
| Basic Annual Safety Training (BAST) |  |  |  |
| Ethics: A Framework for Ethical Decision Making |  |  |  |
|  |  |  |
| **Additional Annual Required Training for HSC Employees** |  |  |
| HIPAA  |  | **Did the employee meet all required and job specific training requirements? \_\_Yes \_\_ No** (Completion of all University Required and Job Specific Training should be considered when assessing the employee’s overall rating). Employee should verify training is complete by attaching a copy of learning transcripts from Learning Central to this review. |
| HSC Code of Conduct and Compliance Agreement |  |
| HSC Culture of Compliance  |  |

1. **Summary**

|  |  |
| --- | --- |
| **Employee overall comments (optional.** **Please write any comments you would like included with your performance review.**  | **Supervisor overall supporting comments: Please include examples regarding employee’s performance.**  |

I have reviewed and discussed the content of this document with my supervisor. My signature acknowledges I have been informed of my performance ratings, but does not necessarily indicate agreement. The process for resolving performance review disagreements can be found in Performance Review and Recognition Policy UBPPM #3230.

Employee Signature \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_ Supervisor Signature \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_

**For Internal HR use only:** Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Data Entry \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ File: \_\_Yes \_\_ No