Performance Assessment Form – Instructions
University of New Hampshire

Annual performance assessments are to be completed and submitted to the Office of Human Resources between January 1 – May 31 of each year. Feedback should reflect work performance during the period immediately preceding this performance assessment (i.e., one year, or six months for introductory period).

SEQUENCE IN USING THE FORM
The Performance Assessment Form is to be completed in the following sequence. (See Overview for further information on completing sections of the form).

1. Downloading the form & Section I
   a. The Performance Assessment Form (PAF) is downloaded from HR web site at www.unh.edu/hr under “Forms”.
   b. The supervisor is responsible for filling in Section I (Employee name/department, etc.). As an option, the employee may fill in this information.

2. The employee fills out the form FIRST, completing the “blue”/shaded sections.

3. Then the supervisor completes the non-shaded sections. (The employee and supervisor are to use the same form.)

4. Next, the supervisor and employee schedule a meeting to have a conversation.

5. Signatures:
   a. Either person can make additions or changes until the form is signed. After the evaluation conversation the supervisor signs the form, and the employee signs. The employee may have a reasonable amount of time to review the form and make additions before signing the form.
   b. Employee’s signature indicates receipt of performance assessment and does not necessarily indicate agreement.
   c. The employee and supervisor each keep a copy of the signed form.

6. The signed document is submitted to HR as:
   a. Hard copy document with original signatures; or
   b. Scanned PDF document (with signatures) emailed as an attachment to the HR Info. With this option the original document would reside with the department/employee. The sender should be sure the PDF version is readable (not too light or dark). Otherwise, the original, paper document should be submitted to HR.

SECTIONS OF THE FORM – ADDITIONAL INFORMATION (Also see Performance Assessment Form – Overview):

Section I  Employee/department information

Section II  Review of Job Goals and Development Goals
The employee and supervisor fill out their sections, describing the employee’s progress in achieving goals previously set for this review period:
   a. Job goals and expected results; and
   b. Professional development goals. Additional lines may be added by
Section III  Competency Areas

- The supervisor has the option to add a competency (III-F), specific to the department, to supplement the other University competencies on the form. The supervisor is to review additional competencies earlier in the assessment period, so the employee is aware that this is an area upon which he or she will be evaluated. The department may add a competency, but not delete one of the standard competencies printed on the form.

- The employee comments on his or her job performance and achievement of results, and provides examples. This is an opportunity to bring your achievements over the assessment period to your supervisor’s attention.

- Competency assessment. The supervisor provides comments on the employee’s performance and achievement of results, and provides examples.

- Performance Rating Scale. The supervisor completes the performance rating scales. There is a rating scale under each competency area as well as an “overall rating of employee’s performance”. On each rating scale place an “X” in one box that best represents the individual’s performance. Provide comments and examples to support each rating.

Section IV  For Managers/Supervisors. This section is to be completed only by staff members who are in managerial/supervisory positions and/or who hold leadership roles for programs and projects. The supervisor may determine whether this section applies to the employee based on his her responsibilities.

Section V  Overall Rating of Employee’s Performance

- Supervisor places an “X” in one box that best represents the individual’s overall performance in the areas of competencies and job goals. Performance ratings should be consistent with written comments relative to performance and achievement of goals.

- Supervisor and employee add overall comments on the performance assessment.

Section VI  Employee Job Goals and Development Planning.

- First the employee creates job and professional development goals. Then the supervisor and employee discuss the employee’s proposed job and professional development goals. The supervisor determines the final goals for the next assessment period that begins immediately after completion of this performance assessment. The goals should be written so that both parties understand their meaning and how to determine their successful completion.

WHICH PERFORMANCE ASSESSMENT FORMAT TO USE

- OPERATING STAFF. The new competency-based Performance Assessment Form (PAF) and use of the rating scale are required for Operating Staff; the narrative format is not an option. Their assessment process has included a similar format; thus the new form is consistent with past practice.
• **EXEMPT STAFF (PAT, EE). Two options** are available for exempt staff performance assessments during the transition to the new competency-based approach. Previously performance assessments for exempt staff included a narrative format.

(1) *Performance Assessment Form* (*PAF*). For exempt staff use of the *rating scale* is optional.

(2) *Narrative format.* The written performance assessment may be in the form of a letter. The rating scale is not required in the narrative version. Feedback provided to the employee is to be comprehensive and to address the following in detail:

- University job competencies. See *Guide to Job Competencies* as reference.
- Job and professional development goals.

**Also:**

- Employee Self-Assessment. The supervisor should ask employees to submit, in preparation for the written assessment, a written description of his or her accomplishments over the assessment period, progress made toward achievement of job and performance goals, and additional comments.
- The performance assessment letter is to be signed by both the supervisor and employee (as is the Performance Assessment form to be signed by both).
- There are *two* options for submitting the *signed document* to HR (either the Performance Assessment form or narrative format):
  - a. Hard copy document with original signatures; or
  - b. Scan PDF document emailed as an attachment to the *HR Info*. With this option the original document would reside with the employee. The sender should check to be sure the PDF version is readable (not too light or dark). If it isn’t readable, the original paper document is to be submitted to HR.
- When the performance rating scale is *not* used for exempt staff, it will be the responsibility of the supervisor and department to determine the basis for making performance distinctions for decisions such as merit increases.