



Performance Evaluation Process Overview

Agenda

- Purpose and Goals of the Performance Evaluation Process
- Performance Evaluation Timeline
- Employee Self Assessments
- Performance Review Form
- Resources for writing Performance Evaluations
- University Advancement's Calibration Process
- Delivery of Performance Evaluation to Employee
- UC's Merit Program
- Questions



Objectives



**Eliminate bias &
barriers to
performance**



**Focus on
prioritizing
relevant goals**



**Improved
organizational
performance**



Timeline



Activity	Proposed Time frame/Deadline
Supervisor asks employee to complete self-assessment .	Tuesday, April 1, 2025
Employee submits self-assessment to supervisor.	Friday, April 11, 2025
Supervisor completes draft performance appraisal for each direct report.	Monday, April 14 – Friday, April 25, 2025
Internal calibration activities and finalization of performance appraisals.	Monday, April 28 – Friday, May 2, 2025
In-person performance appraisal sessions with employees.	Monday, May 5 – Friday, May 16, 2025
Goal Agreement form is finalized for the next review period.	Friday, May 30, 2025
Organizational units certify performance appraisal ratings and send the Performance Appraisal Certification Letter to Central Human Resources.	Friday, May 30, 2025



Self Assessments



Self Assessments

Self-Assessment portion of the performance evaluation form

Performance appraisal addendum

Word document

A blue-tinted photograph of the UC Riverside clock tower, a tall, slender building with a clock face near the base. The image is partially obscured by a dark blue gradient overlay.

Performance Evaluation Form

Performance Evaluation Form



Performance Appraisal Form

EMPLOYEE INFORMATION

Name: Enter employee name Title: Enter employee title
Dept: Enter department UC Hire Date: Enter UC hire date
Review Period: From Enter from date Through Enter through date

Section 1: Reviewing Past Performance (for 2024/2025 review period)

Step 1: Employee assesses own performance

Self-Assessment Instructions

The supervisor sends the Performance Appraisal (PA) form to the employee. In the following self-assessment section, the employee comments on the following:

1. The extent to which goals agreed upon for this review period were achieved.
2. Major accomplishments for this review period (e.g., proposals, assignments completed, reports, presentations or other significant and/or high-quality results and achievements).
3. Special recognition received during the review period.
4. Problems or constraints that influenced the employee's performance during the review period, if applicable.

Upon completion of the self-assessment, the employee returns the PA form to their supervisor.

Self-Assessment

Employee enters self-assessment here

Step 2: Supervisor rates employee on performance factors

Employee Rating Instructions – for supervisor

The supervisor will rate the employee on each of the following seven performance factors (beginning on page 2):

1. Functional and Technical Skills
2. Communication Skills
3. Customer Service
4. Problem Solving and Decision Making
5. Inclusiveness
6. Commitment to Quality and Quantity of Work
7. Collaboration/Teamwork

1. Supervisor reviews the performance factors and their components

On the following pages, each of the seven performance factors listed above are broken down into bulleted components. The components should be used by the supervisor and employee to help further define or conceptualize the performance factor.

For example: performance factor 1 - *Functional and Technical Skills*: The effectiveness with which the employee applies the required skills and knowledge to the job." Note the five bulleted components associated with performance factor 1. The first two components are, "Demonstrates and applies the knowledge and skills necessary to perform the job effectively" and "Chooses appropriate tools or technology for tasks."

2. Supervisor determines the appropriate rating for the employee on each performance factor

The supervisor opens the Performance Factor and Behavioral Indicators Guide (PFBIG) [Forms & Documents / Performance Management webpage](#) and uses it to determine the numerical rating of each performance factor. The supervisor selects the behavioral indicators that best describe the employee's performance in a given performance factor at the level of 5, 4, 3, etc., where:

- 5 = Exceptional Performance
- 4 = Exceeds Performance Expectations
- 3 = Successfully Meets Performance Expectations
- 2 = Performance Needs Improvement
- 1 = Unsatisfactory Performance

3. Supervisor enters the appropriate numerical rating in the box labeled "Factor Rating"

The supervisor also provides supporting written statements in the "Reviewer Comments" section that accurately reflect the supervisor's observations of the employee's performance.



Resources



Key Resources



Performance Factors and
Behavior Indicators



Supervisor Guide for
Supplemental Performance
Feedback Form



UC Performance Review
Module



Calibration Process



Delivering Performance Evaluation



Delivering the Performance Evaluation

Allow the employee to review

Ask the employee if they would like to make comments on the form

Route for signatures

A blue-tinted photograph of the UC Riverside Campanile tower, a tall clock tower with a grid-like facade and a clock face near the base. A small yellow chevron graphic is positioned above the text.

UC's Merit Program



Questions?

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