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| Insert Your Logo Here | **Summary Evaluation Review** |

**INSTRUCTIONS:** This form should be completed at the end of the probationary period/performance review year. Employee & Supervisor comments may be added in the spaces provided. A final copy signed by both employee and supervisor should be forwarded to your HR Manager.

Employee Name:   
Title: Review Period:

Supervisor Name:

**Revisit your goals/expectations from last year.** Did you meet these goals/expectations? If so, provide a brief summary outlining how they were met. If not, consider and summarize why they were not met and perhaps include it as a continuing goal/expectation for the next year. Supervisor comments may be added in blue cells.

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|  | **Goal met?** | **Description of Efforts / Results** |
| Goal 1: |  | Employee comments may be added in white fields. |
|  | Supervisor comments may be added in blue fields. |
| Goal 2: |  |  |
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| Goal 3: |  |  |
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| Goal 4: |  |  |
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| Goal 5: |  |  |
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| **NEW GOALS &**  **EXPECTATIONS** | List 2 – 5 goals to accomplish over the next year. These may include job functions, behaviors to be improved, or skills / practices that could be further developed, or continuation of on-going goals from above. Goals should be specific, measurable, achievable, relevant, timely, and agreed upon by the employee and supervisor. |

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| Goal 1: | Need help? Use the SMART goals template |
| Goal 2: |  |
| ­Goal 3: |  |
| Goal 4: |  |
| Goal 5: |  |

**ADDITIONAL DISCUSSION POINTS**

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|  | **Training and Development**  Discuss training and development opportunities. Visit the Learning & Talent Development website for professional development opportunities: https://www.ohrd.wisc.edu/home |
|  | **Position Description**  Does the employee’s position need to be updated? Contact SOP HR if you need a copy of the most recent position description on file or if updates are needed. |
|  | **Additional Documentation**  Is thereadditional performance-related information to consider (for example, teaching evaluations, client feedback)? If so, please submit with this form and describe in the “Overall Appraisal” section on page 3. |

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| **JOB FUNCTIONS  &  STANDARDS** | Rate employee’s performance as it relates to their position description on the following job functions and standards using the following scale:  **1 2 3 4 5**  Needs Meets Exceeds  Improvement Standards Standards |
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|  | **Area description** | **Rating** | **Comments** |
| **Judgment / Independence** | ♦ Decides correct course of action when choices are  available ♦ Identifies problems and takes initiative in solving them  ♦ Evaluates merit of ideas/facts and arrives at sound  conclusions. |  | Employee comments may be added in white fields. |
|  | Supervisor comments may be added in blue fields. |
| **Productivity / Accomplishments** | ♦ Precise and timely in carrying out duties ♦ Meets deadlines and schedules under normal working   conditions  ♦ Contributes to the goals of the immediate working unit |  |  |
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| **Dependability / Reliability** | ♦ Demonstrates adherence to policies and procedures  ♦ Assumes responsibility for assignments ♦ Follows through to task completion |  |  |
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| **Creativity / Initiative** | ♦ Meets changing conditions and situations  ♦ Utilizes available resources to solve problems  ♦ Originates or develops ideas or solutions  ♦ Strives for excellence |  |  |
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| **Job Knowledge / Rate of Learning** | ♦ Learns quickly and acquires necessary skills  ♦ Comprehends job procedures and methods  ♦ Utilizes previous experience in position. |  |  |
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| **Work Habits / Work Quality** | ♦ Receptive to suggestions and constructive criticism  ♦ Enthusiastic in attempts to improve performance  ♦ Keeps accurate records and is dedicated to accuracy  ♦ Makes efficient use of resources  ♦ Completes work in a timely and accurate manner |  |  |
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| **Interpersonal / Communication Skills** | ♦ Listens, communicates well with others  ♦ Works well with others  ♦ Maintains a positive attitude  ♦ Willing to serve as a resource to others  ♦ Treats others with respect |  |  |
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| **OVERALL  APPRAISAL** | Use the information from the previous sections to develop an Overall Appraisal of your  Work performance. |

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| Employee appraisal: |
| Supervisor comments: |

I have had the opportunity to review this document and discuss its contents with my supervisor. My signature acknowledges that I have been informed of my performance ratings but does not necessarily indicate agreement.

Employee Signature Date

Supervisor Signature Date