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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 yourWork 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