

# Instructions for Alternative Performance Evaluation Form

Revised 2/22/23



Division of Human Resources & Organizational Effectiveness

**Authorization:** The Alternative Performance Evaluation Form may be used in accordance with Standard Administrative Procedure 33.99.03.M0.01 to meet the requirements for position description review and acknowledgement, for creating performance goals, and to assess employee performance.

## Ratings:

Fill out the evaluation form using the following ratings:

**Significantly Exceeds Expectations:** The employee's performance significantly and consistently surpassed job performance standards when measured by quality, quantity and value to the institution.

**Exceeds Expectations:** The employee's performance frequently surpassed job performance standards when measured by quality, quantity and value to the institution. The work produced overall added value to the institution.

**Meets Expectations:** The employee's performance met job performance expectations when measured by quality, quantity and value to the institution and was consistent and reliable.

**Partially Meets Expectations\*:** The employee's performance is still in development and/or did not consistently achieve job performance standards when measured by quality, quantity and value to the institution.

**Does not Meet Expectations\*:** The employee's performance was consistently below expectations when measured by quality, quantity and value to the institution. Immediate corrective action is necessary.

**Not Applicable:** The competency does not apply to the position.

*\*Comments are required for any rating of Partially Meets Expectations or Does not Meet Expectations.*

## Overall Performance Rating:

This rating is required. It will be entered into Workday.

## Performance Goals:

The supervisor and employee establish performance goals associated with job duties, behavioral competencies, and overall objectives. Each goal/objective should include a title, explanation of the objective, completion date and resources needed.

## Position Description Review:

The employee's position description (PD) must be reviewed by the supervisor and the employee. Any applicable changes based on current duties or changes to duties for the coming year should be made at this time.

## Evaluation Delivery:

The supervisor and employee should meet to discuss and sign the performance evaluation. A copy should be given to the employee, and the employee should be allowed to attach a response or comments.

## Workday Steps:

1. The employee must click "Submit" on the self-evaluation task in their Workday inbox in order to initiate the next steps. A self-evaluation may be uploaded, or the employee can simply skip the self-evaluation by clicking the "Submit" button.
2. The supervisor will receive a Workday inbox task to conduct the employee evaluation.
3. The supervisor should complete an evaluation form and meet with the employee to deliver the evaluation. Then, the supervisor uploads the performance evaluation with any additional comments and enters the overall rating in Workday.
4. The employee must acknowledge these items in Workday.
5. The supervisor must complete the manager acknowledgement of the evaluation in Workday.

### For Questions:

HROE Organizational Development  
979-845-4153 | HREvaluations@tamu.edu

# Alternative Performance Evaluation Form for Research Staff



Division of Human Resources & Organizational Effectiveness

Employee's Name: \_\_\_\_\_ Job Title: \_\_\_\_\_

Supervisor's Name: \_\_\_\_\_ Date: \_\_\_\_\_

College/Dept./Unit: \_\_\_\_\_

<i>Competencies</i>	<i>Ratings</i>	<i>Comments (attach additional page if necessary)</i>
Quality of Work and Compliance		
Productivity and Reliability		
Job Knowledge		
Safety		
Core Values		
Employee Development (Supervisors Only)		
Were Previous Year's Performance Goals met?		
Training Certification		

<b>Overall Performance Rating</b>		
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**Performance Goals for Upcoming Year:** List goals/objectives and expected completion dates. Attach additional page if necessary.

**Position Description Review:** The employee's position description has been reviewed and:

*I have reviewed this performance evaluation. My signature indicates that I have been advised of my performance status and does not necessarily imply that I agree with the assessment. I understand that I may attach written comments if desired.*

*Written comments from employee are attached.*

X \_\_\_\_\_  
Supervisor Date

X \_\_\_\_\_  
Employee Date

X \_\_\_\_\_  
*If required, next-level supervisor* Date

After the supervisor and employee have met, discussed and signed the performance evaluation, the supervisor should:

- Give a copy of the signed evaluation to the employee.
- Prior to the May 31 deadline**, follow departmental procedures for uploading information into Workday, in accordance with University Standard Administrative Procedure 33.99.03.M0.01.
- Save an electronic copy of the performance goals. These may be uploaded separately in Workday, later in the year.