

[Completing Performance Appraisals for University of Florida Staff]

This instruction guide is designed to provide details about the University of Florida's staff appraisal process.

Formal appraisals are designed to recap feedback that has been provided to an employee throughout the year. When completing a staff performance appraisal, supervisors should focus on the employee's job performance (the employee's competence or ability to perform the job) and his or her work-related behavior (the way in which an employee performs his or her job), using specific language and examples of work performance or behavior observed throughout the evaluative period.

Ultimately, effective feedback is designed to do one of two things: (1) to reinforce positive work behavior so the employee will repeat the desired behavior in the future or (2) to redirect the behavior so the employee will improve performance moving forward.

Also, when writing appraisals, avoid common rating errors:

- **Carry-over** – The rating assigned doesn't describe performance during the current time frame but instead is more of a reflection of the employee's past performance. "He always gotten an 'exceeds.'"
- **Incentive** – The rating is higher or lower than deserved, based on the concept, "If I give her a good rating, she will work harder in the future" or "If I give her a bad rating, she will work harder in the future."
- **Central tendency** – The manager is unable or unwilling to make distinctions between poor, moderate, and exceptional work, so everyone is rated about the same.
- **Halo/pitchfork effect** – One good deed or bad incident colors the entire evaluation and the rating assigned.
- **Guilt by association** – The rating is provided based on group affiliation, rather than individual performance.
- **Compatibility** – The manager allows friendship or lack of friendship to affect the rating.

To learn more about effective feedback take advantage of the UF Supervisory Challenge workshop, "Power of Feedback" (Course Number SCS030). To register, visit my.ufl.edu: My Self Service, Training and Development, Request Training Enrollment.

The University of Florida's appraisal period for TEAMS and USPS employees is March 1 through February 29. The University has two appraisal forms – one for TEAMS Exempt Employees and another for TEAMS non-exempt, USPS non-exempt, and USPS exempt. The appropriate form should be completed.

Both appraisal forms include an outside activities disclosure section. Employees must check the applicable section and submit appropriate documentation if they engage in any outside activities. The completed appraisal must be discussed with the employee, signed, and dated by March 31.

TEAMS Exempt Employees:

- ▶ The appraisal should be written in narrative format and attached to the Performance Appraisal Form for TEAMS Exempt Employees.
- ▶ An overall rating must be assigned on the form using the rating categories on the form. The overall rating should be consistent with the evaluative comments in the narrative.

Non-exempt TEAMS, USPS Non-exempt, and USPS Exempt:

- ▶ There are five categories of job performance and work-related behavior to be evaluated, with each being evaluated, or rated, using a scale of 1-5. The categories of job performance and work-related behavior are:
 - ▶ Work Performance
 - ▶ Attendance/Reliability
 - ▶ Customer Service
 - ▶ Initiative/Productivity
 - ▶ Teamwork/Interpersonal Skills

- ▶ An overall rating should be assigned based on a total of the ratings assigned to each of the categories. Those overall ratings are:
 - ▶ 5 – 9 = Below
 - ▶ 10 – 14 = Minimal Achieves
 - ▶ 15 – 19 = Achieves
 - ▶ 20 – 23 = Above Average
 - ▶ 24 – 25 = Exceeds

- ▶ If no annual appraisal is done, the employee will default to the previous rating or, if no previous rating exists, an “achieves” rating.

Probationary Appraisals

For employees in or recently completing a probationary period of employment:

- ▶ If a probationary period for a new employee was completed before December 31, an annual appraisal should be completed for this coming appraisal period using dates that begin on the day after the last day of the employee’s sixth month of employment.
 - ▶ For example, if Jane Doe was hired on January 1 of the previous year, her six months’ probationary period lasted six months: January 1, to June 30. A probationary appraisal was completed for her covering her entire six-month probationary period through June 30.
 - ▶ Her annual appraisal period would be from July 1 (the day after the last day of her sixth month of employment), to February 29.
 - ▶ Next year, her annual appraisal period would be on the same “cycle” as other staff, and would be for the standard evaluative period of March 1, through February 28.

- ▶ If a probationary period ends after December 31, the annual appraisal in March should be skipped as there will be less than 60 days prior to the end of the cycle which expires on February 29. The employee should then get on cycle for the next appraisal period.

- ▶ In the absence of a completed probationary appraisal, a probationary employee will default to an “achieves” rating.

If an appraisal will result in an overall rating of minimally achieves or below performance standards, please contact your Employee Relations office. For Employee Relations assistance contact – 392-4777 (IFAS), 392-3786 (Health Science Center), 392-2333 (Physical Plant), 392-6615 (E&G and Auxiliaries).

Questions about the UF performance appraisal process should be directed to Paulene Shindelbower in the Office of Human Resource Services, Employee Relations, at (352) 392-3786, paulene-shindelbower@ufl.edu. Please direct questions about available training resources to Training and Organizational Development at (352) 392-4626, training@ufl.edu.