

Performance Evaluation: Structural Approach

Used for Professional Staff

Instructions and overview

Performance factors

Under each performance factor, clarify the expectations provided by referring to the specific job. Provide samples where indicated. You may develop other expectations related to the position in the spaces provided under each factor and include reference to specific duties when completing the Documentation/Comments section. Attach additional sheets if necessary.

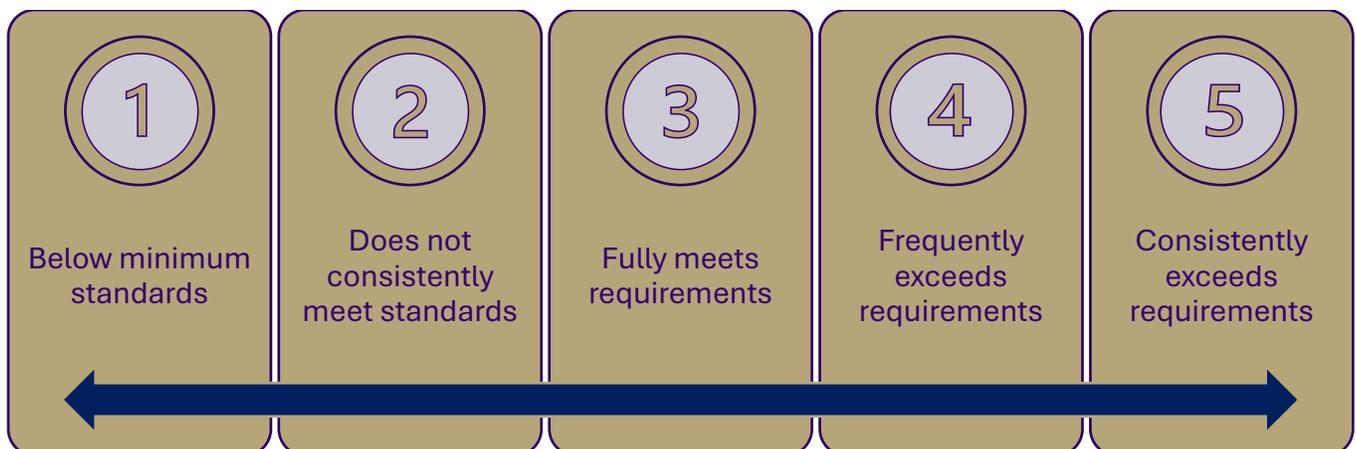
Rate applicable Expectations under each Performance Factor and calculate an average rating for the Factor. For ratings other than "Fully Meets Requirements" (3), include explanations in the Documentation/Comments section, of how the performance varies from the Expectation.

Optional factors / objectives

In addition to tailoring Performance Factors A through I to the job being evaluated, Item J may be used for other Factors or Objectives related to specific duties and responsibilities. (Factors usually relate to ongoing job functions, while Objectives address key results or special projects to be accomplished during a specific performance period.)

Action plans may be listed under the Factor or Objective and rated individually. An overall rating of the Objective should be based on the results achieved. For ratings other than "Fully Meets," use the Documentation Comments section to explain how the result varied from the Objective.

Performance Rating Scale



Employee Information

1. Employee name:
2. Position title:
3. Department:
4. Performance period:
5. Name and title of manager:
6. Conversation date:

Performance factors

A. Job knowledge	Rating
1. Demonstrate understanding of concepts, methods, techniques, principles, etc. necessary to accomplish job duties.	
2. Follows policies/protocols in carrying out job responsibilities.	
3. Is current on technical matters/professional developments in area; participate in committees, seminars/in-services, and professional groups as necessary; reads current literature in professional/technical area.	
4. Responds correctly to inquiries; consults with others or uses resources appropriately.	
- Total	
- Average	
Documentation comments:	

B. Judgement, problem solving, decision making	Rating
5. Identifies key issues to be addressed, prioritizes well, notifies/involves appropriate parties	
6. Analyzes issues and projects thoroughly, considers all factors; obtains and uses resources as necessary.	
7. Takes initiative identifying/researching problems; responds to problems perceived by others; distinguishes “symptoms” from problems; develops appropriate and creative solutions and chooses best alternative; acts in a timely manner.	
8. In problem resolution, the employee encourages participation of others when appropriate; develops effective solutions.	
9. Makes decisions in a timely manner after considering all factors; consults others, shares information as appropriate.	
10. Uses outside resources and consultants to the extent necessary; seeks advice/approval when appropriate.	
- Total	
- Average	
Documentation comments:	

C. Communication	Rating
11. Demonstrates effective oral communication skills.	
12. Listens effectively to others, facilitates group discussions; contributes in a positive and supportive manner	
13. Makes clear, effective oral presentations to groups.	
14. Develops clear, concise, and complete written materials	

15. Communicates appropriate information to management, peers, and subordinates.	
- Total	
- Average	
Documentation comments:	

D. Planning, Productivity, Quality of Work	Rating
16. Value of work accomplished by the employee and unit is appropriate. Explain the productivity measure:	
17. Assignments and projects are completed within specified time frames; deadlines are consistently met.	
18. Identifies long and short-term goals; initiates programs/projects; work is organized and prioritized appropriately.	
19. Demonstrates flexibility by adjusting to unexpected situations/requirements; uses new methods for improved efficiency.	
20. Delegates work when appropriate; consults with supervisor regarding department workload management when necessary	
- Total	
- Average	
Documentation comments:	

E. Financial and other resource management	Rating
21. Plans for current and future needs, space, budget, staff, supplies, equipment, etc.	

22. Develops a realistic budget within guidelines; budget is accurate and complete, including objectives.	
23. Stays within budget in meeting objectives; controls expenses; consults with supervisors regarding potential variance as soon as identified.	
24. Controls FTEs to stay within budget; obtains necessary review and approval to make budget changes.	
25. Oversees efficient utilization of supplies, equipment, and other resources to control costs while maintaining or improving service level.	
- Total	
- Average	
Documentation comments:	

F. Relationship with customers	Rating
26. Promotes emphasis on customer satisfaction and importance of responding courteously and promptly to all internal and external customers.	
27. Develops a realistic budget within guidelines; budget is accurate and complete, including objectives.	
28. Stays within budget in meeting objectives; controls expenses; consults with supervisors regarding potential variance as soon as identified.	
29. Controls FTEs to stay within budget; obtains necessary review and approval to make budget changes.	
30. Oversees efficient utilization of supplies, equipment, and other resources to control costs while maintaining or improving service level.	
- Total	
- Average	

Documentation comments:

G. Leadership, personnel management	Rating
31. Selects, trains, and develops employees; takes appropriate personnel action.	
32. Provides ongoing feedback; identifies development opportunities and actively solicits employee input on work methods, supervision, etc. (Annual evaluations must be completed to receive a rating of 3 or higher.)	
33. Directs the work of staff to achieve optimum productivity; encourages or requires employee involvement in planning and organizing work.	
34. Effectively informs staff of policies, procedures, expectations, and objectives; solicits feedback from employees on an ongoing basis.	
35. Follows University and external agency guidelines and policies relating to staff and faculty management; coaches and counsels as needed; seeks advice and approval for actions when necessary.	
36. Fosters team effort and cooperation among staff members—both intra- and interdepartmentally.	
37. Consistently elicits support and cooperation from others when presenting ideas and concepts; facilitates group process to accomplish goals; demonstrates ability to persuade others to cooperate in achievement of plans.	
- Total	
- Average	

Documentation comments:

H. Reliability and use of work time	Rating
38. Attendance, punctuality consistently maintained; follows correct procedure for notification.	
39. Uses work time appropriately for work activities; attends meetings promptly.	
40. Demonstrates flexibility in scheduling and accepting work assignments to meet needs of department and unit.	
41. Follows procedures for requesting leave and reporting absences and provides necessary documentation/releases to work.	
42. Manages stress, conflict, and frustration in a constructive manner (i.e., talks with others), seeks assistance or direction when necessary, remains calm and professional in stressed situations, etc.	
43. Promotes safe work environment and work practices; complies with all safety guidelines.	
- Total	
- Average	
Documentation comments:	

I. Optional performance factor/objective:	Rating
44.	
45.	
46.	
47.	
48.	
49.	

50.	
- Total	
- Average	
Documentation comments:	

J. Overall performance	Rating
A. Job Knowledge	
B. Judgement, problem solving, decision making	
C. Communication	
D. Planning, productivity, quality of work	
E. Financial and other resource management	
F. Relationships with customers	
G. Leadership and personnel management	
H. Work habits	
I. Optional performance factor/objective	
- Total	
- Average rating	

Evaluator Comments and Signatures

1. Specific contributions and achievements:

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2. Improvement opportunities:

3. Training and development recommendations:

4. Negotiated goals and action plans for rating period:

5. Other comments:

Employee Comments and Signature

Employee signature:

Reviewing Manager Comments and Signature

Reviewing Manager Signature:

Revised: 3/2/2026

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