GUIDELINES FOR OVERALL PERFORMANCE RATING

Important Points:
- There should be no surprises at evaluation time that influence an employee’s overall rating. Any issues not previously discussed or documented should be in place prior to the evaluation.
- Whatever method your department chooses to use in determining overall performance rating, it should be:
  - communicated to all staff
  - consistent across all staff job families

<table>
<thead>
<tr>
<th>Scale</th>
<th>Guidelines</th>
</tr>
</thead>
</table>
| Performance Not Met          | - This category is used when employees have consistently not met their job expectations over the course of the last fiscal year.  
                               - It would be expected that you would have already counseled the employee on the issues that led to this overall rating  
                               - Employees in this category rarely get performance salary increases (unless pre-determined by a contract). |
| Performance Approaching      | - This category can be used for two purposes. One is to indicate performance issues that need attention, the other is to indicate performance for a new hire or someone with a new role who has not been in the position long enough to fully evaluate performance.  
                               - For staff that are new to UMHS or their roles:  
                                 - Have not been on the job for more than 6 months (or whatever timeframe is appropriate for you to evaluate performance)  
                                 - Still mastering new skills and responsibilities  
                                 - You expect the employee will be a solid performer next year  
                               - For staff whose performance is less than solid:  
                                 - Inconsistent demonstration of essential duties/competencies of the job  
                                 - Needs to demonstrate growth and improvement in order to meet job requirements  
                                 - Specific action plan should be developed to improve performance that includes targets and checkpoints |
| Solid Performance            | - This category is used when the employee is fully capable, effective and provides value for the organization  
                               - Serves as a role model:  
                                 - Receives compliments on their work  
                                 - Work is thorough and accurate; is accountable for own outcomes  
                                 - Competent in all areas of their position  
                                 - Contributes to the goals of the organization and the unit  
                                 - Exhibits professional demeanor; shows dedication to position  
                                 - Requires little or no supervision  
                                 - Strong skills |
| Exemplary Performance        | - This category is used when the employee regularly meets solid performer plus:  
                               - Demonstrates excellence and exceeds expectations consistently  
                               - Accomplishments have significant impact on mission/ goals  
                               - Anticipates problems/needs and takes proactive steps  
                               - Actively mentors  
                               - Work is innovative and exceptional  
                               - Continuously increases the quality and/or quantity of contribution  
                               - Is a “go to” person |