Revision to Academic Staff Performance Evaluation

The Academic Staff Policies Working Group recommends the changes to the Annual Evaluation Form as shown below. The Codification Committee has reviewed the documents.

Untracked version:

UNIVERSITY OF WISCONSIN–MILWAUKEE
Academic Staff Annual Evaluation

Purpose
This annual written performance evaluation is conducted according to the procedures specified in UWM Academic Staff Personnel Policies and Procedures, Chapter 105 (see full policy below). Performance reviews are designed to assist in the professional development of the staff member, to encourage a high level of service to the University, and to give the staff member a clear understanding of her/his role in the unit in which employed.

UWM Employment History
Changes have been made to this document to encourage employees and supervisors to make better use of this evaluation, both the paper documents and the conference. To encourage more awareness of an employee’s history with UWM and policies relating to appointment status types, employees are encouraged employees to create and attach a description of their UWM Employment History to increase awareness of their employment history with UWM. Include history of appointments, % of appointments, changes in status, transfers, etc.

Sample histories are available at www.__________

Period
The period for which performance is to be evaluated is the previous calendar year.

Timeline

<table>
<thead>
<tr>
<th>Deadline</th>
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<tr>
<td>January 15</td>
<td>Employee’s self-evaluation due to Supervisor</td>
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20 working days following January 15
Supervisor/Employee conference to discuss performance must take place before this date. For academic staff supervised by a departmental executive committee, the committee or its designee shall conduct the conference. If this deadline is not met, employee should submit the self-evaluation to the school, college, or division head; the self-evaluation will stand as the official evaluation. Employees are advised to maintain a signed copy of the self-evaluation for their records.

5 working days following conference
Supervisor gives employee written evaluation by this date. If this deadline is not met, employee should submit the self-evaluation to the school, college, or division head; the self-evaluation will stand as the official evaluation. Supervisors and employees are advised to maintain a signed copy of the completed performance evaluation for their records.

10 working days following receipt of supervisor’s evaluation
Employee may submit a written response to supervisor’s evaluation within ten working days following receipt of the supervisor’s evaluation. This document is filed in the employee’s official personnel file with the self-evaluation and supervisor’s evaluation.

Note
Failure of the academic staff member to complete an annual performance review may be viewed negatively during the academic staff member’s review for change in status to indefinite appointment.

Policy
UWM Chapter 105 PERFORMANCE REVIEW

105.01 Performance Review and Employee Self-Evaluation

Every academic staff member who holds a position at 50% of full-time or more shall be reviewed in the sixth month after the initial appointment and annually thereafter. The review shall begin with a self-evaluation. Supervisors shall request academic staff self-evaluations prior to December 1 and staff shall submit their self-evaluations on or before January 15. The supervisor shall hold a conference with the staff member no later than 20 working days after January 15. In the case of academic staff who are supervised by the departmental executive committee, the departmental executive committee or its designee shall conduct the conference. A written evaluation of the employee’s performance, as discussed at the conference, shall be given to the employee by the supervisor within 5 working days after the conference. If there is no written evaluation by the supervisor within 5 working days after the conference or if no conference is held, the employee’s self-evaluation will stand as the official performance evaluation. The employee shall have the option of responding in writing to the supervisor’s written evaluation within 10 working days of its receipt. The document(s) shall be filed in the employee’s official personnel file upon receipt. Failure of the academic staff member to complete an annual performance review may be viewed negatively during the academic staff member’s review for change in status to indefinite appointment.

http://www4.uwm.edu/secu/asgov/docs/105.htm

Source
Academic Staff Document [XX]. Please contact the Academic Staff Committee chair [asc-chair@uwm.edu] if you have questions about this evaluation, the policy, or procedure.
UNIVERSITY OF WISCONSIN–MILWAUKEE
ACADEMIC STAFF ANNUAL EVALUATION

(Time period being reviewed)

To Be Completed By The Employee

Name __________________________ Title __________________________

Supervisor’s Name __________________________ Title __________________________

Division/Department __________________________

Employee’s Appointment Type:
☐ Category A (non-instructional) ☐ Category B (instructional) ☐ Category B (research)

Employee’s Current Appointment Status (see contract)
--------------- ☐ fixed term ☐ probationary ☐ indefinite

This annual written performance evaluation is conducted according to the procedures specified in UWM Academic Staff Personnel Policies and Procedures, Chapter 105. Performance reviews are designed to assist in the professional development of the staff member, to encourage a high level of service to the University, and to give the staff member a clear understanding of her/his role in the unit in which employed.

I. Evaluate your performance of the regular duties as stated in your position description and any special objectives or goals, which were established for the year at a previous evaluation.

II. Describe special activities and projects which you completed and assess their contribution to the achievement of the department’s objectives of your department.

III. Indicate the nature of your professional development activities that enhance your job performance and professional skills. (Include Examples may include courses, degrees, seminars, training, research, publications, exhibitions, presentations, and/or participation in professional organizations.) Assess the impact on your professional development.

IV. List and explain service activities that are beyond the scope of your position description and departmental—position description related responsibilities that demonstrate a commitment to higher education or to your professional field and to the University of Wisconsin-Milwaukee. Appropriate examples include service on academic staff and/or faculty standing committees, academic staff governance and other campus-wide, college/school, department or unit activities or service projects.

—— A. University service

—— B. Community service that is university-related

—— C. Professional service
V. List any special goals and objectives for the next year.

VI. If you have a supervisory appointment, assess your performance in hiring, coaching and staff development, performance review, and conflict resolution.

________________________________________

Employee's Signature __________________________ Date
UNIVERSITY OF WISCONSIN–MILWAUKEE
ACADEMIC STAFF ANNUAL EVALUATION

(Time period being reviewed)

To Be Completed By The Immediate Supervisor

Name_________________________________________ Title _____________________________

Supervisor’s Name __________________________________ Title ___________________________

Division/Department______________________________________________________________

Employee’s Appointment Type:
☐ Category A (non-instructional) ☐ Category B (instructional) ☐ Category B (research)

Employee’s Current Appointment Status (see contract)
☐ fixed term ☐ probationary ☐ indefinite

Conference Date ____________________________

This annual written performance evaluation is conducted according to the procedures specified in UWM Academic Staff Personnel Policies and Procedures, Chapter 105. Performance reviews are designed to assist in the professional development of the staff member, to encourage a high level of service to the University, and to give the staff member a clear understanding of her/his role in the unit in which employed.

I. Review the position description (note modifications, if any) and briefly evaluate employee's performance of regular job duties and responsibilities as well as any special goals and objectives established for the year (Section I of employee's evaluation).

(Please note: if the position description has changed significantly, the position may need to be reviewed for title assignment.)

II. Comment on the contribution of special activities and projects completed by the employee and assess their contribution of the achievement of the department’s objectives of the department (Section II of employee's evaluation).

III. Comment on professional development activities (Section III of employee's evaluation).

IV. Comment on service activities beyond the scope of his/her position description and departmental responsibilities that demonstrate a commitment to higher education and to the University of Wisconsin-Milwaukee (as described in Section IV of employee’s evaluation). Include activities that are beyond the scope of his/her departmental responsibilities as noted on the position description. Appropriate examples include service on academic staff and/or faculty standing committees, academic staff governance and other campus-wide, college/school, department or unit activities or service projects.
V. Comment on and list any special goals and objectives for the next year (Section V of employee’s evaluation).

VI. If employee has a supervisory appointment, assess his or her performance in hiring, coaching staff development, performance review and conflict resolution.

VII. Summarize overall evaluation of performance (e.g., needs improvement, satisfactory, excellent, etc.).

Response, if any, of employee: The employee may respond in writing to the supervisor’s written evaluation within ten working days of its receipt. S/he should submit one copy of the response to the supervisor and one copy to the school, college, or division head.

The full document (employee self-evaluation, supervisor evaluation, employee response (if any)) shall be filed in the employee’s official personnel file.

Signatures verifying that the conference has taken place and the performance evaluation has been completed and reviewed:
(Please note: the employee’s signature does not necessarily signify agreement with the supervisor’s evaluation.)

Staff Member: __________________________  Date: ____________  Supervisor: __________________________  Date: ____________

Signatures verifying the performance evaluation has been received:

Department Head: __________________________  Date: ____________  Dean/Division Head: __________________________  Date: ____________
Purpose
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UWM Employment History
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Note
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conference, shall be given to the employee by the supervisor within 5 working days after the conference. If there is no written evaluation by the supervisor within 5 working days after the conference or if no conference is held, the employee’s self-evaluation will stand as the official performance evaluation. The employee shall have the option of responding in writing to the supervisor’s written evaluation within 10 working days of its receipt. The document(s) shall be filed in the employee’s official personnel file upon receipt. Failure of the academic staff member to complete an annual performance review may be viewed negatively during the academic staff member's review for change in status to indefinite appointment.

http://www4.uwm.edu/secu/asgov/docs/105.htm

**Source**
Academic Staff Document ______. Please contact the Academic Staff Committee chair [asc-chair@uwm.edu] if you have questions about this evaluation, the policy, or procedure.

*Untracked version follows:*
To Be Completed By the Employee

Name ____________________________   Title ____________________________

Supervisor’s Name ____________________________   Title ____________________________

Division/Department _________________________________________________________

Employee’s Appointment Type:

- [ ] Category A (non-instructional)
- [ ] Category B (instructional)
- [ ] Category B (research)

Employee’s Current Appointment Status (see contract):

- [ ] fixed term
- [ ] probationary
- [ ] indefinite

This annual written performance evaluation is conducted according to the procedures specified in *UWM Academic Staff Personnel Policies and Procedures, Chapter 105*. Performance reviews are designed to assist in the professional development of the staff member, to encourage a high level of service to the University, and to give the staff member a clear understanding of her/his role in the unit in which employed.

III. Evaluate your performance of the regular duties as stated in your position description and any special objectives or goals, which were established for the year.

IV. Describe special activities and projects which you completed and assess their contribution to the achievement of the department’s objectives.

III. Indicate your professional development activities that enhance your job performance and professional skills. (Examples may include courses, degrees, seminars, training, research, publications, exhibitions, presentations, and participation in professional organizations.) Assess the impact on your professional development.

IV. List and explain service activities that are beyond the scope of your position description and departmental responsibilities that demonstrate a commitment to higher education or to your professional field and to the University of Wisconsin-Milwaukee.

VII. List any goals and objectives for the next year.

VIII. If you have a supervisory appointment, assess your performance in hiring, staff development, performance review, and conflict resolution.

_________________________   ____________________
Employee’s Signature   Date
UNIVERSITY OF WISCONSIN—MILWAUKEE
ACADEMIC STAFF ANNUAL EVALUATION

(Time period being reviewed)

To Be Completed By the Immediate Supervisor

Name ____________________________ Title ____________________________

Supervisor’s Name ______________________ Title ____________________________

Division/Department ____________________________

Employee’s Appointment Type:
☐ Category A (non-instructional) ☐ Category B (instructional) ☐ Category B (research)

Employee’s Current Appointment Status (see contract)
☐ fixed term ☐ probationary ☐ indefinite

Conference Date ____________________________

This annual written performance evaluation is conducted according to the procedures specified in UWM Academic Staff Personnel Policies and Procedures, Chapter 105. Performance reviews are designed to assist in the professional development of the staff member, to encourage a high level of service to the University, and to give the staff member a clear understanding of her/his role in the unit in which employed.

I. Review the position description (note modifications, if any) and briefly evaluate employee's performance of regular job duties and responsibilities as well as any goals and objectives established for the year (Section I of employee’s evaluation).

(Please note: if the position description has changed significantly, the position may need to be reviewed for title assignment.)

III. Comment on the contribution of special activities and projects completed by the employee and assess their contribution of the achievement of the department’s objectives (Section II of employee’s evaluation).

III. Comment on professional development activities (Section III of employee's evaluation).

IV. Comment on service activities beyond the scope of his/her position description and departmental responsibilities that demonstrate a commitment to higher education and to the University of Wisconsin-Milwaukee (Section IV of employee’s evaluation).

V. Comment on and list goals and objectives for the next year (Section V of employee’s evaluation).

VI. If employee has a supervisory appointment, assess his or her performance in hiring, staff development, and performance review and conflict resolution.

VII. Summarize overall performance (e.g., needs improvement, satisfactory, excellent, etc.).
The employee may respond in writing to the supervisor’s written evaluation within ten working days of its receipt. S/he should submit one copy of the response to the supervisor and one copy to the school, college, or division head.

The full document (employee self-evaluation, supervisor evaluation, employee response (if any)) shall be filed in the employee’s official personnel file.

Signatures verifying that the conference has taken place and the performance evaluation has been completed and reviewed:

(Please note: the employee’s signature does not necessarily signify agreement with the supervisor’s evaluation.)

________________________  __________________________
Employee                  Date                        Supervisor   Date

Signatures verifying the performance evaluation has been received:

________________________  __________________________
Department Head            Date                        Dean/Division Head    Date