**U Wide Form**

UM 942

**Rev:** 06/08

**Route this form to:**

This form is for departmental use.

wdmk

# Administrative Summary of

# Performance Appraisals

## Use this form at the end of the year to convert the ratings done on the Performance Appraisal form (UM 941) into a rating for each appraisal and an average for the year as a whole.

## The form guides you step-by-step through the simple calculations. It takes about 15 minutes to complete the form. A pocket calculator may be needed. This form may be completed by someone other than the supervisor since the performance ratings have already been determined.

**Step 1**: Collect all the performance appraisals done this fiscal year. Photocopy Section II of each form.

**Step 2**: Calculate a rating for each appraisal and an average rating for the year using the worksheet on page 2 of this form.

**Step 3**: Complete the administrative process as follows:

* Attach a copy of Section II of each performance appraisal (UM 941) form.
* Discuss the average rating with the employee and obtain signature.
* Forward this form and the attachments to the dean, director or department head for review, a salary action or other decision (if appropriate) and a signature.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Employee Name | | | | Employee ID |
| DeptID | Entity | | College/  Administrative Unit | |
| Classification Title | | Job Code | | Date appointed  to Job Code |

|  |  |  |
| --- | --- | --- |
| Performance Appraisal:  3 mo.  6 mo.  12 mo. | Overall Average  (on a scale of 1-7) | Schedule/Range No. |
| Dates covered: from \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ to \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | **OR** Rate Arranged |
| Probationary Appraisal:  3 mo.  6 mo.  12 mo. | Below Midpoint  At or Above Midpoint  At Maximum or Above |
| Dates covered: from       to |
| Does employee pass probation?  Yes  No |

|  |  |
| --- | --- |
| Rater’s Comments: | |
| Rater’s Signature | Date |
| Rater’s Name (printed) | Phone |
| Title | |
| Campus Address | |

The employee’s signature means only that the employee has had the opportunity to review this summary of previous appraisal.

|  |  |
| --- | --- |
| Employee’s Comments: | |
| Employee’s Signature | Date |

|  |  |
| --- | --- |
| Dean, Director or Department Head’s Signature | Date |
| Dean, Director or Department Head’s Name (printed) | Phone |

**WORKSHEET**

1 of 2

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2 of 2

Step 1: **Figure the weighted rating for each performance appraisal, as follows:**

* **Transfer** the percentages listed in the summary at the bottom of Section II to the boxes below. (This shows what percentage of the job was performed at each level.)
* **Multiply** the percentage listed under each rating category by the number for that rating category. (This ensures that the most important parts of the job will have the most influence on the average rating.)
* **Add** the results of those multiplications together. (This is the average rating for each appraisal.)
* **Multiply** the ratings by the number of months the appraisal covered. (This ensures that the appraisal that covered the most time will have the most influence on the overall average for the year.)
* **Sum** the weighted ratings and the number of months covered by the appraisals.

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Not Satisfactory | Marginal | Achieved Expectation | More than Expected | Much more than expected | Achieved Excellence | Exceptional Achvmnt. |  |  |  |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |  |  |  |

First Appraisal: From to

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| % | % | % | % | % | % | % | Rating for 1st Appr. | # of months | Weighted Rating |
| x 1 | x 2 | x 3 | x 4 | x 5 | x 6 | x 7 |
|  |  |  |  |  |  |  | = | x | = |

Second Appraisal: From to

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| % | % | % | % | % | % | % | Rating for 2nd Appr. | # of months | Weighted Rating |
| x 1 | x 2 | x 3 | x 4 | x 5 | x 6 | x 7 |
|  |  |  |  |  |  |  | = | x | = |

Third Appraisal: From to

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| % | % | % | % | % | % | % | Rating for 3rd Appr. | # of months | Weighted Rating |
| x 1 | x 2 | x 3 | x 4 | x 5 | x 6 | x 7 |
|  |  |  |  |  |  |  | = | x | = |

Fourth Appraisal: From to

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| % | % | % | % | % | % | % | Rating for 4th Appr. | # of months | Weighted Rating |
| x 1 | x 2 | x 3 | x 4 | x 5 | x 6 | x 7 |
|  |  |  |  |  |  |  | = | x | = |

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |  |  | Total Months | Sum of Weighted Ratings |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |

Step 2: **Figure the overall average for the year (or to date), as follows:**

* **Write** the sum of the weighted ratings in the space BELOW and divide by the total number of months the appraisals covered.
* **Round** to the nearest tenth of a point.
* **Write** the overall average for the year in the box at the far right and again on the front of this form.

|  |  |  |  |
| --- | --- | --- | --- |
| Sum of weighted ratings | Total months |  | Which rounds to |
|  | ÷ | = |  |
|  |  |  | **Overall Average**  **On a scale of 1-7** |