


## INSTRUCTIONS FOR FACULTY PERFORMANCE EVALUATION

1. General
  - a. **Open template and Enable Macros if prompted.**
  - b. Goal section and evaluation section cover the same performance period.
  - c. Form permits tabbing through the document and fields should expand as needed.
  - d. Mid-year Performance Evaluation (Optional)
    - i. Chair/supervisor discretion
    - ii. **Please use an alternate font color for mid-year review comments in the “Performance Evaluation” section.**
  - e. Year-end Performance Evaluation
    - i. Comments should be provided for each relevant performance area.
    - ii. **If a mid-year evaluation was conducted, do not overwrite. Simply add year-end comments in black font.**
2. Goal Setting and % Effort
  - a. Department Chair/Supervisor to meet with faculty member to identify goals and % effort for the performance year.
  - b. Revise as needed throughout performance year and note dates of revisions.
  - c. Sign-off is required.
3. Rating
  - a. Ratings are on a 1.0 (min/low) – 4.0 (max/high) scale with 1 decimal place.
  - b. The scale for faculty and staff is identical:
    - i. 1 = Below Expectations
    - ii. 2 = Partially Meets Expectations
    - iii. 3 = Fully Meets Expectations
    - iv. 4 = Performance Leader
4. Effort
  - a. Indicate % effort in the form of a decimal (eg. 25% effort = 0.25)
  - b. **Please do not manually enter anything in “Total Effort” cell.** It will be calculated later.
5. Total Effort, Weighted Rating and Overall Rating [blue shaded cells]
  - a. **Please do not manually enter anything in these cells.** They will be automatically calculated.
6. Calculation
  - a. Select the “Evaluation and Performance” section of the document by clicking the 
  - b. Hit F9
  - c. Calculations should automatically appear for total effort, weighted rating, and overall rating fields. Total effort should = 1.00



PERFORMANCE EVALUATION [scale 1.0 (min/low) – 4.0 (max/high)]				
Provide Comments, Rating and Effort for each relevant performance area. Use an alternate color font for mid-year review, if applicable. Add year-end review in black font. (Do not overwrite mid-year.) Do not enter data into blue shaded cells. These will be calculated automatically by selecting the table and hitting F9.				
Performance Area	Comments	(X.X) Rating	(.xx) Effort	Weighted Rating
Teaching				0.0
Research				0.0
Service				0.0
Administration				0.0
			<b>TOTAL EFFORT</b>	<b>0.00</b>
<b>OVERALL RATING</b>				<b>0.0</b>

(select the entire section near the heading “PERFORMANCE EVALUATION” then hit F9 to auto calculate fields)

7. External Professional Commitments Report [EPCR]
  - a. Confirm that faculty member has completed and maintained required updates to the EPCR and requests for approval of external professional commitments as applicable.
8. Review and Sign
9. Save document with the following naming convention
  - a. Faculty Last Name First Initial Department 20-21
  - b. Department Names
    - i. AN
    - ii. FCM
    - iii. IM
    - iv. IMS
    - v. Psych
    - vi. COM Dean
    - vii. MedEd
    - viii. Other