OLD DOMINION UNIVERSITY
Division of Talent Management and Culture

CLASSIFIED EMPLOYEE EVALUATION · 2026 CYCLE · SUPERVISOR'S GUIDE

# Evaluating 2026 Performance

A practical guide to assessing performance against objectives and competencies, selecting supported ratings, and writing clear, evidence-based comments.

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00 · Start here

# The Central Idea

> **KEY IDEA**
>
> A rating **communicates** the decision. The comment **explains** the decision. The evidence **supports** both.

Your evaluation is not a summary of your impressions of the employee. It is a written record you can back up with evidence of **what was expected**, **what actually happened** across the full performance cycle, **which Policy 1.40 rating definition** best fits that evidence, and **why**. A well-written evaluation should make sense to someone who was not present during the performance cycle.

## How to Use This Guide

**STEP 1**

**Read**

Go to the section of this guide that matches the PAPERS tab you are completing.

**STEP 2**

**Observe Kate Simmons (Fictitious Employee Example)**

See how the same objective or competency can produce different evidence, ratings, and supervisor comments.

**STEP 3**

**Draft**

We suggest drafting your ratings and comments in Word before entering them in PAPERS.

KS

**Meet Kate Simmons**

Kate is a fictional employee who serves as Administrative Assistant for Continual Development in Academic Affairs. She coordinates Provost-sponsored events, schedules, records, communications, and campus partnerships. She is the same employee featured in the employee self-evaluation guide. Here you see her from the supervisor's side: her self-evaluation, the evidence a supervisor gathers, and the ratings and comments a supervisor writes. Her examples are illustrative, not automatic rating rules. Use only evidence that is true for your own employees.

## Your Route Through the Guide

**FIRST, PREPARE**

**Understand what's new, gather evidence, understand ratings**

Sections 01–03

**THEN, RATE AND COMMENT**

**Job Duties, Special Assignments, Performance Objectives, rating decisions, Standard Competencies, University Competencies, Development Plan**

Sections 04–08

**FINALLY, FINALIZE**

**Overall Rating, final checks, AI use, final review**

Sections 09–12

## Key Dates: 2026 Evaluation

The evaluation has three separate steps, each with its own window. Plan for reviewer time and the employee meeting before each deadline.

| NOV 17 – DEC 4, 2026 | DEC 7 – DEC 22, 2026 | JAN 4 – JAN 15, 2027 |
|---|---|---|
| **Supervisor completes** | **Reviewer approves** | **Meet and acknowledge** |
| Complete the employee's evaluation in PAPERS. | Evaluation routes to the reviewer for approval and sign-off. | Supervisor meets one-on-one with the employee; employee acknowledges. |

## Looking Ahead: The 2027 Performance Plan

IF YOU USE PAPERS

### Separate process

Creating the 2027 performance plan is a **separate step** from completing and acknowledging the 2026 evaluation.

IF YOU USE MS FORMS

### Continual process

The new 2027 Performance Plan is created **at the end of the 2026 evaluation**, in the same process.

The 2027 cycle launches **January 25, 2027**.

| JAN 25 – FEB 8 | FEB 9 – FEB 19 | FEB 19 – MAR 1 |
|---|---|---|
| **Supervisor creates the plan** | **Reviewer reviews and approves** | **Meet; employee acknowledges** |

## Common Questions

**What if the employee doesn't submit a self-evaluation?**

Contact **hrdept@odu.edu**.

**Who is my Reviewer?**

Your Reviewer is typically your immediate supervisor. To confirm, open your employee's evaluation in PAPERS. On the Overview tab, find **Step 6, Review Evaluation/Approve Task**. The person listed as the **Task Owner** (shown as Reviewing Officer) is your Reviewer. If the Reviewer is missing or not correct, contact **hrdept@odu.edu**.

> QUESTIONS AND RESOURCES
>
> Questions: **hrdept@odu.edu**
> Supervisor guides: odu.edu/human-resources/policies/performance-management
> Policy: DHRM Policy 1.40, Performance Planning and Evaluation

01 · Understand

# What You Complete

You complete seven tabs, in order. Only Performance Objectives (80%) and Standard Competencies (20%) feed the Overall Rating; the other tabs give context and a more complete record.

| # | PAPERS TAB | SUPERVISOR ACTION | WEIGHT |
|---|---|---|---|
| 1 | Job Duties | Review only | — |
| 2 | Special Assignments | Comment, if applicable | — |
| 3 | Performance Objectives | Rate + comment | **80%** · individual weights set in the plan |
| 4 | Standard Competencies | Rate + comment | **20%** · 5% each |
| 5 | University Competencies | Comment only | — |
| 6 | Development Plan | Comment only | — |
| 7 | Overall Rating | Review Overall Rating + comment | Calculated |

## What's Different This Year

**JOB DUTIES**

**Not rated. No comment.**

Review only, for context.

**SMART PERFORMANCE OBJECTIVES**

**Rate + comment.**

80% of the overall rating.

This year you do **not** rate or comment on Job Duties. The evaluation centers on the SMART performance objectives established in the employee's performance plan.

## Why the Shift Matters

Under the revised DHRM Policy 1.40, 80% of the rating is based on performance of assigned objectives, and Standard Competencies measure not just *what* is performed but *how*. The shift gives employees clear targets to grow toward and gives supervisors a basis for coaching during the year, not just judging at the end.

| | RATED ON JOB DUTIES | RATED ON SMART OBJECTIVES |
|---|---|---|
| **Focus** | Doing the job as described | Achieving defined, agreed-on results |
| **The question** | "Did they do their duties?" | "What did they accomplish, and how?" |

| | RATED ON JOB DUTIES | RATED ON SMART OBJECTIVES |
|---|---|---|
| **Expectations** | Broad, ongoing, hard to measure | Specific, measurable, time-bound |
| **Evidence** | Impressions and activity | Results set up front in the plan |
| **For the employee** | Maintain the status quo | Clear targets to grow toward |
| **For the supervisor** | Judge at year-end | Coach and check progress all year |

> **THE NEW CONVERSATION**
>
> From **"Did they do the job?"** to **"What did we agree to achieve, and how can I help?"**

## Why a Well-Written SMART Objective Makes Your Job Easier

When an objective is written in SMART format, each part tells you what to look for and what evidence supports the rating.

**S · SPECIFIC**
You know exactly what was expected.

**M · MEASURABLE**
The evidence to look for is built in.

**A · ACHIEVABLE**
A fair, realistic standard to rate against.

**R · RELEVANT**
Tied to the role and its priorities.

**T · TIME-BOUND**
A clear deadline to check results against.

02 · Understand

# Start With Evidence, Not the Rating

Before you rate, know what was expected and what actually happened.

DON'T START WITH

**“What rating should I give this employee?”**

START WITH

**“What was expected, and what does the evidence show?”**

## Your Four Steps for Each Objective

| 01 | 02 | 03 | 04 |
|---|---|---|---|
| **What was expected** | **What happened** | **Which rating** | **Why** |
| What did the performance plan require? | What did the employee actually complete or achieve? | Which Policy 1.40 rating definition best fits? | What specific results support that rating? |

For Standard Competencies, you'll use a matching set of steps: **Behavior → Example → Impact → Rating** (Section 07).

## Review the Full Cycle: January 1 – December 31

The rating should reflect the whole performance cycle, not one accomplishment, one difficulty, or the most recent event.

**Avoids recency bias**

The latest events are easiest to remember, so they can be unintentionally overweighted.

**Avoids one-event ratings**

One memorable success or setback shouldn't define the year.

**Shows consistency**

Ratings hinge on “consistently,” “some of the time,” and “occasionally,” which can only be judged across the year.

**Captures growth**

Progress and shifting priorities show up over time.

## Gather Your Evidence

Check off each source as you pull it together. Each one tends to show a different kind of result.

- [ ] **The employee's 2026 performance plan**
  Exact objectives, measures, deadlines, weights, and competency language

- [ ] **Your own notes and check-in records**
  Observations, feedback given, progress discussed during the year
- [ ] **Calendars, emails, meeting notes**
  Timing, coordination, commitments, follow-through
- [ ] **Reports, records, deliverables**
  Completion, quality, accuracy, quantity
- [ ] **Feedback from customers and partners**
  Customer experience, collaboration, improvement
- [ ] **Training records and applied learning**
  Skills developed and used in actual work
- [ ] **Documented changes in assignments or priorities**
  Redirections, adjusted deadlines, agreed changes to expectations
- [ ] **The employee's self-evaluation**
  The employee's perspective and evidence

## The Employee's Self-Evaluation Is a Resource

> **YOUR RESPONSIBILITY UNDER POLICY 1.40**
>
> A supervisor **must review** and **should consider** the self-evaluation when completing the employee's performance evaluation. However, the supervisor is not required to include the self-evaluation's comments and ratings in their evaluation of the employee.

The self-evaluation gives you the employee's perspective on:

| | | | | |
|---|---|---|---|---|
| Accomplishments and completed work | Supporting evidence and results | Contributions you may not have seen | Challenges or changes affecting performance | Learning and development |

Employees must be given up to 14 calendar days to complete their self-evaluation before you complete the annual evaluation. The employee's ratings don't automatically determine yours. Your ratings may be higher, lower, or the same; what matters is that they are independent, evidence-based, and explained.

03 · Understand

# The Five Ratings and How PAPERS Calculates

You select a rating for every Performance Objective and Standard Competency. The definitions below are quoted from DHRM Policy 1.40.

| | | |
|---|---|---|
| 5 | **Extraordinary** | "The employee consistently exceeded the expectations of the performance objective and competency." |
| 4 | **Highly Successful** | "The employee exceeded the expectations of the performance objective and competency some of the time." |
| 3 | **Successful** | "The employee consistently met the expectations of the performance objective and competency." The expected standard |
| 2 | **Partially Successful** | "The employee occasionally met the expectations of the performance objective and competency but was not consistent and at times did not meet the expectations." |
| 1 | **Unsuccessful** | "The employee did not meet the expectations of the performance objective and competency." |

Source: DHRM Policy 1.40, Performance Management, Performance Rating Structure (rev. 8/22/2025).

**SUCCESSFUL IS A POSITIVE RATING**

It means the established expectations were consistently met. Ratings above Successful require proof that the employee went beyond the expectation, not stronger words.

## What Separates the Ratings?

**HOW WELL?**

**“Met” vs. “exceeded”**

Did the employee meet, exceed, or fall short of the expectation? Levels 1–3 describe how well it was met. Levels 4–5 require evidence the employee went beyond it.

**HOW CONSISTENTLY?**

**“Some of the time” vs. “consistently”**

Highly Successful means exceeding some of the time. Extraordinary means exceeding consistently across the cycle.

For an overall rating of Extraordinary, you do not need to submit a separate form this year.

## Each Rating Has a Number

PAPERS multiplies each rating's number by the weight of that objective or competency, then adds the results to calculate the Overall Rating.

| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|
| Unsuccessful | Partially Successful | Successful | Highly Successful | Extraordinary |

**EXAMPLE**

Highly Successful (4) on an objective weighted 30% → 4 × 0.30 = **1.20**

## How the Weighting Works

**PERFORMANCE OBJECTIVES · 80%**

3–5 SMART objectives. Individual weights set during planning.

**STANDARD COMPETENCIES · 20%**

Four statewide competencies. Fixed weight: 5% each.

Objectives aren't always weighted equally: a 30% objective counts more than a 20% one. Check each objective's weight in the employee's plan.

## Don't Let the Math Replace the Judgment

PAPERS auto-calculates **only the Overall Rating**. It does not rate individual objectives or competencies; you select each of those. Every objective and competency rating needs:

- A rating that aligns with the policy definition
- Evidence that supports the rating
- A comment that explains the result or behavior assessed

## When Is an Overall “Unsuccessful” Rating Permitted?

**POLICY 1.40 REQUIREMENT**

An overall Unsuccessful rating requires that the employee received a **Performance Improvement Plan (PIP)** or a **Written Notice under Policy 1.60**, for any reason, during the performance cycle.

**WHAT IT DOES NOT MEAN**

A PIP or Written Notice permits, but does not compel, an overall Unsuccessful rating. The overall evidence must support it.

**INDIVIDUAL RATINGS**

Individual objectives and competencies can still be rated Unsuccessful when the evidence is clearly documented.

- Either document satisfies the requirement; the absence of a PIP alone does not prohibit the rating if a Written Notice was issued.
- Policy 1.40 requires ongoing feedback and addressing known deficiencies during the year. A PIP is developed with TMC and should last no more than 90 calendar days.
- Before finalizing an overall Unsuccessful rating, verify your records and consult TMC and your reviewer.

04 · Complete

# Context Before You Rate: Tabs 1 and 2

Review Job Duties and Special Assignments before you rate anything. Neither is rated or weighted, but both tell you what the employee was expected to do and what else they contributed.

**TAB 1 · JOB DUTIES**

Review only

- Drawn from the employee's position description
- Use as context for what the employee was expected to do
- No separate rating or weight

**TAB 2 · SPECIAL ASSIGNMENTS**

Comment, if applicable

- Pulled from the position description, when applicable
- Comment on relevant contributions and outcomes
- Not rated or weighted

## Writing a Special Assignment Comment

When a special assignment applies, describe what the employee contributed and what resulted, without assigning a rating.

**ASSIGNMENT**

**What was it?**

Name it briefly.

**CONTRIBUTION**

**What did they do?**

Describe the employee's specific role and actions.

**OUTCOME**

**What resulted?**

Note deliverables, timing, or effects on the unit.

05 · Complete

# Performance Objectives: Assess the Result

Objectives are 80% of the Overall Rating. Rate each objective as it was written in the plan, not as you wish it had been written. Rate each one on its own evidence.

## Four Steps for Each Objective

**1 · WHAT WAS EXPECTED**

Read the SMART objective. Note the required outcome, measure, and deadline.

**2 · WHAT HAPPENED**

Read the employee's self-evaluation. Check it against your notes, records, and other evidence.

**3 · WHICH RATING**

Pick the Policy 1.40 rating definition that best fits what happened.

**4 · WHY**

Write a comment that explains how the results support that rating.

KS

**Meet Kate Simmons**

Kate's evidence below shows how the same objective can produce different results, ratings, and supervisor comments.

**KATE'S ESTABLISHED OBJECTIVE · OBJECTIVE 1 · 30% WEIGHT**

By October 31, 2026, design and implement a standardized electronic invitation and RSVP tracking system using Microsoft Power Automate and related tools for Provost-sponsored events, improving accuracy for at least two events.

The objective tells you exactly what evidence to look for:

| DEADLINE | DELIVERABLE | MEASURE | INTENDED RESULT |
|---|---|---|---|
| **October 31, 2026** | **Standardized RSVP system** | **At least two events** | **Improved accuracy** |

## From Results to Rating: Kate's Objective at Five Levels

Each level shows a hypothetical outcome and an illustrative supervisor comment. These are examples, not automatic rating rules; evaluate the full body of evidence against the policy definition.

| | |
|---|---|
| **5** | **Extraordinary: Consistently exceeded the objective: six events, sustained improvements, wider adoption.**<br>Kate implemented the standardized RSVP tracking system on October 15, ahead of the October 31 deadline, and used it for six Provost-sponsored events across the performance cycle, three times the two-event requirement. Across all six events, duplicate records were nearly eliminated and final headcounts were available two days in advance, allowing catering and room setup to plan accurately. Kate refined the workflow twice based on partner feedback, documented the process, and trained colleagues; two other Academic Affairs offices adopted the approach. These sustained results consistently exceeded the established objective. |
| **4** | **Highly Successful: Completed ahead of schedule; four events; added improvements and instructions.**<br>Kate implemented the standardized RSVP tracking system on October 15, ahead of the October 31 deadline. She used the system for four Provost-sponsored events, exceeding the two-event requirement. The process reduced duplicate RSVP records and improved access to accurate attendance information. She also developed instructions that supported continued use by colleagues. These results demonstrate performance above the established objective. |
| **3** | **Successful: Completed by the deadline; two events; accuracy improved.**<br>Kate implemented the standardized RSVP tracking system by the October 31 deadline and used it for two Provost-sponsored events, as required. The system reduced duplicate RSVP records and improved access to accurate attendance information for both events. These results consistently met the established objective. |
| **2** | **Partially Successful: Developed and tested the system; implemented for only one event.**<br>Kate developed and tested the RSVP tracking system and implemented it for one Provost-sponsored event. Although the process improved access to RSVP information for that event, the established objective required implementation for at least two events by October 31. The second implementation was not completed during the performance cycle. The documented result reflects partial achievement of the established objective. |
| **1** | **Unsuccessful: Initial work began, but the system was not implemented.**<br>Kate reviewed automation options and completed initial Power Automate training. However, the RSVP tracking system was not implemented, and no Provost-sponsored events used it during the performance cycle. The objective's deliverable and two-event measure were not met. |

**WHAT SEPARATES THE LEVELS**

Differences in **completion, timeliness, scale, and sustained results** explain the rating. The difference is what the employee actually did, not stronger words.

## A Rating Without an Explanation

> ***RATING: HIGHLY SUCCESSFUL***
>
> *"Kate did an outstanding job with the RSVP system. She went above and beyond and showed excellent initiative."*

This comment is positive, but it leaves the rating unsupported. **What's missing?**

| | | |
|---|---|---|
| What specifically exceeded the objective? | What results were achieved? | What evidence supports the rating? |

> **REMEMBER**
>
> Positive language is not the same as supporting evidence.

## Make the Rating and Comment Match

The Highly Successful comment in the level 4 example works because it covers all four steps:

| 1 · WHAT WAS EXPECTED | 2 · WHAT HAPPENED | 3 · WHICH RATING | 4 · WHY |
|---|---|---|---|
| Two events by October 31 | Four events, two weeks early; fewer duplicates; instructions for colleagues | Highly Successful: the objective was exceeded | "These results demonstrate performance above the established objective." |

## Documenting Performance Below Expectations

When results fall short, your comment matters even more, so be specific. Using the Partially Successful example:

- [ ] **State what was and wasn't achieved**
  Developed, tested, and implemented once; second implementation not completed.
- [ ] **Name the expectation not met**
  At least two events by October 31.
- [ ] **Include relevant documented circumstances**
  Note any agreed changes, barriers, or redirections you verified.
- [ ] **Avoid assumptions about attitude, motivation, or intent**
  Describe the performance gap, not the employee's character.

- [ ] **Stay consistent with feedback given during the year**
  The evaluation shouldn't be the first time the employee hears about the gap.

## What Makes a Strong Objective Comment?

Every objective comment answers the same four questions:

| 01 | 02 | 03 | 04 |
|---|---|---|---|
| **What was expected** | **What happened** | **Which rating** | **Why** |
| What did the performance plan require? | What did the employee actually complete or achieve? | Which Policy 1.40 rating definition best fits? | What specific results support that rating? |

A strong comment doesn't need to repeat the whole objective or list every activity. **Specific evidence matters more than length.**

06 · Complete

# When Results Fall Short

Sometimes an employee misses a measure and gives a reason. Consider the reason, but a good reason alone does not make the rating Successful. What decides the rating is whether the expectations changed during the year.

## Same Objective. Two Perspectives.

**KATE'S OBJECTIVE 4 · MEETING FOLLOW-UP & ACTION TRACKING · 15% WEIGHT**

Two measures built in: notes distributed within three business days for all designated meetings, and at least 90% of action items current.

**MEASURE 1 · ALL NOTES WITHIN 3 BUSINESS DAYS**

**75%**

of notes on time · Not met

**MEASURE 2 · AT LEAST 90% OF ITEMS CURRENT**

**82%**

of action items current · Not met

***KATE'S VIEW · SELF-RATED SUCCESSFUL***

*"I maintained notes and an action-item tracker for all designated meetings this year. During peak event periods, especially the fall Provost series, I prioritized time-sensitive event deadlines, which delayed some meeting notes beyond three business days. I kept the tracker updated and followed up on open items once those events concluded."*

Kate's explanation is reasonable, but she still missed both measures. Use one question to decide how to rate:

**ASK YOURSELF**

**Did you change the expectations for this objective during the year?**

**YES, I CHANGED THEM**

**Rate against the new expectations.**

For example, you told the employee to put other work first and agreed to later deadlines.

**NO, THEY DID NOT CHANGE**

**Rate against the original expectations.**

A good reason for missing a measure does not, by itself, make the rating Successful.

**Also consider:** Did something outside the employee's control get in the way? Focus on what the employee could control. If you find the objective as written was not actually possible to achieve, rate based on what the employee accomplished.

## Kate: Two Different Supervisor Scenarios

SCENARIO A

### Original expectations remained

The supervisor communicated deadlines, gave feedback, and helped set priorities. The requirements stayed achievable. Both measurable standards were missed.

**Partially Successful may be supported**

SCENARIO B

### Priorities were changed

The supervisor explicitly directed Kate to urgent Provost events and agreed some meeting follow-up deadlines could be extended. Kate met those revised expectations.

**Successful may be supported**

**WHAT CHANGED?**

Not Kate's effort. The expectations that applied, and the evidence. This is why documenting agreed changes during the year matters.

## Acknowledge Both Perspectives in Your Comment

**ILLUSTRATIVE COMMENT · SCENARIO A · PARTIALLY SUCCESSFUL**

Kate maintained meeting notes and an action-item tracker throughout the performance cycle. Notes were distributed within three business days for about 75% of designated meetings, and 82% of follow-up items were current, below the 90% requirement. Kate identified competing event responsibilities as a contributing factor, and these circumstances were considered. The established requirements remained in effect and were not consistently achieved. Based on documented results and the expectations in effect, Partially Successful is supported.

| WHAT WAS EXPECTED | WHAT HAPPENED | WHICH RATING | WHY |
|---|---|---|---|
| Names both measures | States the results and Kate's explanation | Partially Successful | Requirements stayed in effect and were not consistently met |

This comment assumes you verified the results and confirmed the original expectations still applied.

**ILLUSTRATIVE COMMENT · SCENARIO B · SUCCESSFUL**

Kate maintained meeting notes and an action-item tracker throughout the performance cycle. During the fall Provost event series, she was directed to prioritize time-sensitive event work, and extended deadlines for meeting follow-up were agreed upon for that period. Kate met the adjusted expectations: notes were distributed within the revised timeframes, and open action items were brought current once the events concluded. Measured against the expectations in effect, Kate consistently met this objective, and Successful is supported.

## Reduce Surprises Before They Become Disagreements

**DURING THE YEAR**

Observe, give timely feedback, document progress, and discuss barriers.

**WHEN PRIORITIES CHANGE**

Clarify what comes first, check if objectives are still achievable, and document changes.

**WHEN PERFORMANCE FALLS SHORT**

Identify the gap, communicate expectations, provide support, follow procedures.

**AT EVALUATION TIME**

Review the employee's view, assess the full evidence, explain the rating.

Being fair means you consider the circumstances. It does not mean you automatically excuse or penalize results.

## Before You Rate: Supervisor Reflection Checklist

Use these six questions before rating, especially when results fell short. The evaluation shouldn't be the first time an employee hears about a concern.

- [ ] **Timely feedback**
  Did I raise concerns when performance began slipping?
- [ ] **Competing priorities**
  Did I help the employee prioritize conflicting work?
- [ ] **Changed expectations**
  Did I revise or communicate changes to the original expectations?
- [ ] **Resources and support**
  Did the employee have the tools and support needed?
- [ ] **Employee communication**
  Did the employee raise barriers or ask for guidance?
- [ ] **Consistency**
  Am I applying the same standards fairly?

07 · Complete

# Standard Competencies: Assess the Behavior

The four Standard Competencies are 20% of the Overall Rating, 5% each. Objectives measure what the employee achieved; competencies measure how the employee demonstrated expected workplace behaviors across the whole performance cycle.

**PERFORMANCE OBJECTIVES · 80%**

What results did the employee achieve?

**STANDARD COMPETENCIES · 20%**

**What behaviors did the employee show?**

| 5% | 5% | 5% | 5% |
|---|---|---|---|
| **Problem Solving, Judgment, Planning & Organization** | **Citizen & Customer Interaction** | **Teamwork & Building Relationships** | **Coaching & Communication** |

## How to Evaluate a Competency

Review what the employee did across the whole performance cycle. A single example may illustrate a behavior, but the rating should reflect the overall pattern.

| 01 | 02 | 03 | 04 |
|---|---|---|---|
| **Behavior** | **Example** | **Impact** | **Rating** |
| What did the competency expect, and what did the employee do? | What specific situations from the year show it? | What difference did it make? | Does the pattern show the expectation was consistently met, or exceeded some or all of the time? |

## Evaluate Behaviors, Not Impressions

**LOOK FOR EVIDENCE**

- Specific actions and work results
- Patterns of behavior over the performance cycle
- Quality, consistency, and impact
- Contributions behind the scenes

**DON'T RATE BASED ON**

- Personality or communication style alone
- Popularity or personal rapport
- Visibility, confidence, or self-promotion
- One memorable incident or assumptions

**CHECK YOURSELF**

Would I give the same rating if this employee were quieter, less visible, or less like me?

**ABOUT KATE'S EXAMPLES**

The level descriptions below are hypothetical and are not automatic rating rules. Match each employee's evidence to the exact expectation in their Performance Plan and the Policy 1.40 rating definition.

## Problem Solving, Judgment, Planning & Organization

**POLICY DESCRIPTION · 1 OF 4**

Identifies workplace challenges, works to resolve them and takes responsibility for decisions. Understands the Commonwealth's purpose and mission. Plans, organizes, manages time and works in support of the Commonwealth's mission, vision, and values.

| WHAT TO LOOK FOR | LESS OBVIOUS EXAMPLES |
|---|---|
| Identifies issues early and gathers relevant facts | Prevents problems that never become visible |
| Weighs options, consequences, and when to escalate | Knows when a decision is outside their authority |
| Sets priorities and adjusts plans as things change | Explains tradeoffs when urgent requests compete |
| Tracks commitments and follows through | Improves a routine to reduce recurring errors |

**KATE EXAMPLE**

When a reserved meeting room became unavailable, Kate identified another suitable location, confirmed the arrangements, and notified those affected, so the event proceeded as planned.

### What the evidence might look like at each level

**5**

**Extraordinary: Consistently anticipates problems and builds lasting fixes.**

Throughout the year, problems were anticipated before they disrupted work, for example a pre-event logistics checklist the office now uses for every event, after which no events required same-day room or technology changes.

**4**

**Highly Successful: Consistent planning plus some proactive improvements.**

Deadlines and changes managed consistently, with several conflicts caught early, such as a double-booked room identified three weeks ahead and a comparable space secured.

| | |
|---|---|
| 3 | **Successful: Routine challenges resolved; work organized consistently.**<br>Schedules and deadlines maintained throughout the year; routine problems resolved with sound judgment. |
| 2 | **Partially Successful: Some issues handled, but follow-through inconsistent.**<br>Routine changes handled, but follow-up items missed during busy periods and reminders needed. |
| 1 | **Unsuccessful: Repeated missed follow-through disrupts work.**<br>Deadlines and assigned actions not consistently tracked; colleagues frequently intervene. |

## Citizen & Customer Interaction

**POLICY DESCRIPTION · 2 OF 4**

Responds appropriately to the needs of internal and external customers.

| WHAT TO LOOK FOR | LESS OBVIOUS EXAMPLES |
|---|---|
| Knows who depends on their work, including internal partners | Anticipates recurring questions before customers ask |
| Listens, clarifies needs, and responds respectfully | Makes information easier to find or understand |
| Gives accurate information and timely follow-through | Helps another department serve its own customers |
| Refers or escalates requests appropriately | Stays responsive through changes or concerns |

**CUSTOMER SERVICE INCLUDES EVERYONE**

Customer service includes everyone who depends on the employee's work, not just answering a phone or resolving a complaint. Being courteous and responsive is the expectation; it is not automatically above expectation.

### What the evidence might look like at each level

| | |
|---|---|
| 5 | **Extraordinary: Sustained above-expectation service across the performance cycle.**<br>Recurring needs regularly anticipated and solutions coordinated across offices, with sustained, measurable improvement in service. |
| 4 | **Highly Successful: Consistent service plus some meaningful improvements.**<br>Accurate, professional service throughout, plus improvements with documented results, such as clearer instructions that cut repeat inquiries. |

| | |
|---|---|
| **3** | **Successful: Accurate, professional, timely service consistently.**<br>Requests answered accurately and followed up; referrals made appropriately. |
| **2** | **Partially Successful: Courteous at times, but inconsistent follow-through.**<br>Some inquiries left too long; referrals needed additional follow-up. |
| **1** | **Unsuccessful: Frequent inaccurate or incomplete responses.**<br>Others regularly correct information or complete follow-up. |

## Writing a Competency Comment: Show the Behavior

| INSTEAD OF | WRITE |
|---|---|
| **“Kate is a great team player.”** | During fall Provost event planning, Kate coordinated with catering, Facilities, and AV to confirm responsibilities before each event, so setup issues were resolved before guests arrived. |

Build every competency comment with the same four steps:

| 01 | 02 | 03 | 04 |
|---|---|---|---|
| **Behavior** | **Example** | **Impact** | **Rating** |
| What did the employee do? Name the specific action. | When and where? Give a specific situation from the performance cycle. | What difference did it make for the work or the people served? | Does the pattern show consistently met, or exceeded some or all of the time? |

## Kate's Self-Evaluation vs. the Supervisor's Comment

**Citizen & Customer Interaction.** Here the supervisor's rating is higher than Kate's, because the supervisor's evidence includes results Kate didn't emphasize.

**KATE'S SELF-RATING · SUCCESSFUL**

*"Throughout 2026, I consistently responded to the needs of internal and external customers by providing timely, accurate information and following through on requests related to Provost-sponsored events and administrative activities. My customers included faculty, academic leadership, University staff, students, campus service departments, external guests, vendors, and community partners. For example, when a visiting speaker requested additional information about parking and arrival procedures, I coordinated with the appropriate campus contacts to confirm the arrangements and provided clear instructions before the event. I recognized that campus departments such as ITS, Facilities, and University Events were also customers of the information I provided. When I received questions outside my area, I identified the appropriate contact."*

**SUPERVISOR'S RATING · HIGHLY SUCCESSFUL**

Kate consistently demonstrated strong customer service when responding to the needs of faculty, staff, students, campus departments, and external guests. Beyond providing timely and accurate assistance, she proactively identified recurring service challenges and implemented improvements. After recognizing that visiting speakers and guests frequently requested clarification about parking, building locations, and arrival procedures, Kate collaborated with campus service departments to develop a standardized guest information guide. She implemented the guide for six Provost-sponsored events, reducing routine logistical inquiries from approximately 10 to three per event. The guide was subsequently adopted by other event organizers. Kate also anticipated the information needs of internal campus partners by confirming event requirements before submitting requests. These accomplishments demonstrate performance beyond routine customer service expectations and support a Highly Successful rating.

**TEACHING POINT**

Your evidence may go beyond what the employee wrote. When your rating differs, explain **what exceeded** (or fell short), not simply that the employee was helpful or professional.

## Teamwork & Building Relationships

**POLICY DESCRIPTION · 3 OF 4**

Collaborates and cooperates to get the job done. Initiates and cultivates business relationships with stakeholders. Develops and maintains positive relationships.

| WHAT TO LOOK FOR | LESS OBVIOUS EXAMPLES |
|---|---|
| Shares information and follows through on commitments | Builds contacts before an urgent need arises |
| Seeks input and coordinates across roles | Connects colleagues instead of becoming a bottleneck |
| Builds productive stakeholder connections | Learns other departments' constraints and lead times |
| Resolves differences constructively | Creates shared practices that ease collaboration |

> **KATE EXAMPLE**
>
> During Provost event planning, Kate coordinated with catering, Facilities, AV, and Academic Affairs to confirm responsibilities and resolve setup needs before the event.

**What the evidence might look like at each level**

| | |
|---|---|
| 5 | **Extraordinary: Sustained strengthening of cross-unit collaboration.** Partners consistently brought together early; shared practices strengthened and adopted by others, such as planning check-ins partner offices asked to continue. |
| 4 | **Highly Successful: Consistent collaboration plus occasional improvements to shared work.** Reliable coordination plus improvements, such as a shared responsibilities tracker partners reported saved them time. |
| 3 | **Successful: Reliable collaboration and constructive relationships.** Updates shared promptly, responsibilities clarified, own part completed on time. |
| 2 | **Partially Successful: Cooperates sometimes; communication inconsistent.** Delayed updates and follow-through create extra coordination for others. |
| 1 | **Unsuccessful: Poor coordination regularly interferes with shared work.** Changes not shared; others resolve avoidable problems. |

## Coaching & Communication

**POLICY DESCRIPTION · 4 OF 4**

Coaches others to succeed and is receptive to coaching from others. Proactively assesses strengths and developmental needs. Gives timely and specific feedback to others. Exchanges ideas and opinions. Provides and receives information or feedback.

| WHAT TO LOOK FOR | LESS OBVIOUS EXAMPLES |
|---|---|
| Explains a process so others can work independently | Peer coaching without supervisory authority |
| Gives specific, timely, respectful feedback | A visible change in work habits after feedback |
| Invites feedback and adjusts when appropriate | Input that prevents a repeat problem |
| Communicates ideas, status, and concerns clearly | Asks for help or clarifies priorities before work slips |

**KATE EXAMPLE**

Kate incorporated feedback during RSVP testing and wrote workflow instructions that colleagues used to run the process without her.

**COACHING WITHOUT SUPERVISING**

Employees do not need supervisory authority to demonstrate coaching. Explaining a task, helping a colleague, receiving feedback, and adjusting work are all relevant evidence.

**What the evidence might look like at each level**

| | |
|---|---|
| 5 | **Extraordinary: Sustained above-expectation coaching and communication.** Colleagues regularly helped to learn processes; reusable guidance built and refined from feedback, with measurable gains in others' independence. |
| 4 | **Highly Successful: Consistent communication plus some extra support.** Clear updates throughout, plus instructions or walkthroughs that let colleagues work independently. |
| 3 | **Successful: Clear information, feedback, and help consistently.** Timely, accurate communication; questions answered; feedback applied. |
| 2 | **Partially Successful: Some effective exchanges, but inconsistent.** Changes not always clarified promptly; colleagues need follow-up. |
| 1 | **Unsuccessful: Information frequently late or unclear; feedback not applied.** Repeated confusion results from late or unclear communication. |

## What If You and the Employee Disagree?

**Kate Simmons · Teamwork & Building Relationships** (fictional example)

| | |
|---|---|
| 4 | **KATE'S SELF-RATING**<br>**Highly Successful**<br>She believes her collaboration went beyond expected behaviors. |
| 3 | **YOUR ASSESSMENT**<br>**Successful**<br>Documentation shows consistent collaboration, but not above expectations. |

| 01 | 02 | 03 | 04 |
|---|---|---|---|
| **Review her evidence** | **Apply the definition** | **Discuss the difference** | **Decide and document** |
| Consider contributions you may not have seen. | Does the evidence show meeting or exceeding? | Ask Kate for her perspective and more examples. | Select the supported rating; explain why in your comment. |

**ILLUSTRATIVE COMMENT · SUCCESSFUL**

Kate consistently coordinated with Facilities, AV, catering, and Academic Affairs colleagues throughout the performance cycle. When event schedules changed, she shared updates promptly, clarified responsibilities, and completed her tasks so partners could prepare together. Kate identified her collaboration as exceeding expectations; her examples were reviewed and reflect reliable, constructive teamwork that consistently met the expectations of this competency. Successful is supported.

**THE GOAL**

The goal isn't the same rating. It's a **fair, consistent, well-supported** one.

08 · Complete

# University Competencies and Development Plan

Both tabs are comment only. They are not rated, not weighted, and do not enter the Overall Rating, but they complete the record of the employee's year.

## Tab 5 · University Competencies

> **COMMENT ONLY**
>
> Drawn from the employee's position description; reflects expectations for the role. These may differ by position or department, so read the exact language in the employee's plan.

Use the same steps as Standard Competencies, without a rating:

| 01 | 02 | 03 |
|---|---|---|
| **Behavior** | **Example** | **Impact** |
| What does the competency describe, and what did the employee do? | Where did the employee show it? | How did it help the work or the University? |

## Tab 6 · Development Plan

**Why comment if it isn't rated?** Not everything important to performance receives a rating. The Development Plan documents the employee's progress in building skills, knowledge, and future capability.

> **A PROGRESS RECORD**
>
> The Development Plan is not rated. It is a record of progress, not another performance objective.

| 01 | 02 | 03 |
|---|---|---|
| **Learning** | **Application** | **Next steps** |
| What did the employee develop? | How was the learning used? | What continued growth or support fits? |

**YOUR COMMENTS HELP**

| Recognize | Document | Identify | Inform |
|---|---|---|---|
| progress | applied skills | remaining needs | future planning |

## Kate's Development Plan

| KATE'S DEVELOPMENT PLAN | |
|---|---|
| **Learning goal** | Build proficiency in Microsoft Power Automate and related Microsoft tools to support event coordination through improved invitation and RSVP tracking. |
| **Learning steps** | 1. LinkedIn Learning: *Power Automate Essential Training*<br>2. LinkedIn Learning: *Microsoft Forms Essential Training*<br>3. Design and test an RSVP workflow using Forms, Power Automate, and Excel or SharePoint<br>4. Implement the system for at least one Provost-hosted or Provost-sponsored event |
| **Resources needed** | LinkedIn Learning access · Microsoft 365 tools · Time during work hours · Supervisor feedback during testing and implementation |
| **Target completion** | **May 30, 2026** |

**EXAMPLE SUPERVISOR COMMENT**

Kate completed training in Power Automate and Microsoft Forms and applied the learning to develop the RSVP tracking workflow. She incorporated feedback during testing and demonstrated increased independence in using these tools. Continued opportunities to refine the workflow and share the process with colleagues will support further development.

The comment documents progress, application, and future growth without assigning a rating.

## Same Project. Two Different Stories.

**PERFORMANCE OBJECTIVE · FOCUS: RESULTS**

**What was accomplished?**

Kate implemented the RSVP system ahead of schedule and used it for four events instead of the required two.

**DEVELOPMENT PLAN · FOCUS: GROWTH**

**What capability was developed?**

Kate learned Power Automate, practiced building workflows, used feedback, and applied new technical skills.

**ONE EXPERIENCE, TWO SECTIONS**

One experience can support both sections, but the comments answer different questions.

09 · Summarize

# Overall Rating

PAPERS calculates the Overall Rating from your objective and competency ratings; your comment explains the performance behind it. Get each objective and competency rating right on its own evidence, and the Overall Rating follows.

## PAPERS Workflow: How the Overall Rating Builds

This display is new in PAPERS this year.

**1 · PERFORMANCE OBJECTIVES TAB**

The header shows **Score in progress: Unrated** until you rate each objective and click **Save Draft** or **Save & Continue**.

**2 · OBJECTIVE RATINGS SAVED**

The score in progress updates to the rating up to that point.

**3 · STANDARD COMPETENCIES TAB**

Enter all four ratings. The score updates again; this is the Overall Rating.

**4 · OVERALL SUMMARY TAB**

The rating shows at the top. Enter the required comment and click **Complete**. The score populates automatically when marked Complete.

## Kate's Overall Rating: How the Pieces Add Up

| ELEMENT | WEIGHT | RATING | WEIGHTED |
|---|---|---|---|
| **Performance Objectives · 80%** | | | |
| RSVP automation | 30% | 4 · Highly Successful | 1.20 |
| Event communications | 20% | 3 · Successful | 0.60 |
| Administrative process improvement | 15% | 4 · Highly Successful | 0.60 |
| Meeting follow-up & action tracking | 15% | 2 · Partially Successful | 0.30 |
| **Standard Competencies · 20%** | | | |
| Problem Solving, Judgment, Planning & Org. | 5% | 3 · Successful | 0.15 |
| Citizen & Customer Interaction | 5% | 4 · Highly Successful | 0.20 |
| Teamwork & Building Relationships | 5% | 3 · Successful | 0.15 |
| Coaching & Communication | 5% | 3 · Successful | 0.15 |
| **Weighted result** | **100%** | | **3.35 · Successful** |

**EACH ELEMENT DRIVES THE RESULT**

PAPERS does this math for you. Two Highly Successful objectives did not lift Kate's overall above Successful, because the Partially Successful objective and the competency ratings also count. Get each one right on its own evidence.

## Self-Rating vs. Calculated Overall Rating

**EMPLOYEE'S OVERALL SELF-RATING**

**Selected by the employee**

The employee chooses the rating they believe represents their overall performance and adds a supporting comment.

**SUPERVISOR'S OVERALL RATING**

**Calculated by PAPERS**

Automatically calculated from your Performance Objective (80%) and Standard Competency (20%) ratings.

The two may differ. In the employee guide, Kate's illustrative overall self-rating is Highly Successful; her Overall Rating here is Successful. Consider her view, weigh the evidence, and explain the calculated result.

## Writing the Overall Comment

The overall comment is a short summary of the year, not a list of everything the employee did.

| 01 | 02 | 03 |
|---|---|---|
| **State the overall pattern** | **Highlight the evidence** | **Connect the conclusion** |
| What characterized the year? | Which results and behaviors support the rating? | How does the pattern fit the calculated rating? |

**KATE · EXAMPLE OVERALL COMMENT · SUCCESSFUL**

Throughout 2026, Kate consistently supported the administrative operations of the Office of the Provost through effective event coordination, accurate communications, and dependable administrative support. She demonstrated initiative by implementing an automated RSVP tracking process ahead of schedule and using it for four events, exceeding the original expectation of two. The process reduced duplicate records, improved access to attendance information, and increased efficiency in event preparation.

Kate maintained positive working relationships with colleagues and campus partners, demonstrating professionalism, responsiveness, and effective communication. She coordinated event requirements, addressed routine challenges, and introduced shared tracking tools that improved visibility into assignments and deadlines.

Kate also strengthened her technical capabilities through training in Microsoft Power Automate and Forms and successfully applied those skills to improve office processes. Her overall performance reflects consistent fulfillment of established expectations, meaningful contributions to administrative improvements, and effective collaboration.

10 · Finalize

# Before You Submit

Run these final checks before the evaluation goes to the reviewer. An accurate evaluation rests on consistent standards, relevant evidence, and clear explanations.

2026 EVALUATION · LOOKING BACK

**Write to the performance evidence**

1. Describe actual results or observed behaviors
2. Include specific evidence, consistency, and impact
3. Document meaningful gaps that affected this year, if the rating justifies the comment

PLANNING FOR 2027 · LOOKING FORWARD

**Keep 2027 goals separate**

1. SMART objective when a measurable work result is needed
2. Development Plan for skill-building, coaching, or learning
3. Define milestones, measures, and support
4. Keep future goals separate from this year's assessment

## Kate Simmons: Evaluate 2026, Plan for 2027

3

2026 · SUCCESSFUL

Kate prepared accurate event invitations, agendas, and related communications throughout the evaluation period. She verified event details with campus partners and corrected a location discrepancy before materials were distributed, helping attendees receive reliable information. Her consistent attention to accuracy and timely communication supported the coordination of Provost-sponsored events.

2027 SMART OBJECTIVE · PROPOSED

By September 30, 2027, develop and implement a standardized pre-distribution review checklist for Provost-sponsored event communications. Apply it to at least four events, verify dates, locations, accessibility details, and contact information with partners before distribution, and track corrections to identify recurring issues.

KEEP THE TWO YEARS DISTINCT

The 2026 comment **records Kate's results**. The 2027 objective **sets a new measurable expectation**, not a criticism of 2026 work. Confirm actual targets and feasibility with the employee before adopting.

## Replace General Statements With Evidence

| INSTEAD OF | WRITE |
|---|---|
| “Kate is an excellent employee who goes above and beyond.” | → The specific results that exceeded expectations |
| “Kate needs to improve her follow-up.” | → Which measure was missed, and by how much |
| “Kate is a real team player.” | → A collaboration example and what it achieved |
| “Kate had a solid year.” | → The pattern across objectives and competencies |
| “Kate struggled this year because of her workload.” | → The documented circumstances you considered |

## When the Overall Rating Isn't What You Expected

**THE RULE**

**Never raise or lower an objective or competency rating to reach the Overall Rating you want.**

**BEFORE CHANGING ANY OBJECTIVE OR COMPETENCY RATING**

1. **Check the inputs.** Are the weights, ratings, and records accurate?
2. **Revisit the expectations.** What did the objective or competency require, not what overall did I expect?
3. **Examine the full year.** Am I relying on one event or an overall impression?
4. **Seek missing evidence.** Did the employee give examples I haven't considered?
5. **Test for bias.** Would I give this rating without knowing the overall?

**IF A RATING NEEDS TO CHANGE**

- Change it only when a fresh review shows the original rating wasn't supported
- Update the comment to explain the revised rating

**REMEMBER**

Reconsider when evidence warrants it, not to make the math match an expectation.

## Would Your Evaluation Hold Up?

It should make sense to someone who wasn't there during the performance cycle.

- [ ] **Does each rating match the policy definition?**

- [ ] Does each comment contain specific, supportable evidence?
- [ ] Did I consider the employee's self-evaluation?
- [ ] Did I evaluate the entire performance cycle, not just recent events?
- [ ] Are rating differences with the employee explainable?
- [ ] Did I complete applicable nonrated sections?
- [ ] Does the overall comment align with the calculated rating?

11 · Finalize

# Supervisor Use of AI

AI can help you write the comment. You make the evaluation. The supervisor signs off on the evaluation, not the writing assistant.

**YOU STAY RESPONSIBLE**

For assessing the evidence, selecting every rating, the accuracy of every statement, protecting personnel information, and the final wording.

## AI Supports the Writing. You Own the Evaluation.

**AI CAN HELP**

- Organize notes and documented results
- Draft clear, professional comments written about the employee
- Identify gaps or vague statements
- Reduce repetition across sections
- Improve readability without changing facts

**SUPERVISORS MUST**

- Independently assess performance
- Select each objective and competency rating
- Consider the employee's self-evaluation
- Verify every example, measure, and claim
- Protect confidential personnel information

## Before Prompting: Make the Performance Decision

| 01 | 02 | 03 | 04 |
|---|---|---|---|
| **Gather** | **Rate** | **Draft** | **Verify** |
| Paste the exact objective or competency and collect your evidence. | **You decide.** Select the rating using the Policy 1.40 definitions. | Ask AI to draft a comment that follows the steps for that section. | Check accuracy, tone, omissions, and privacy. |

**RATE FIRST**

Only then ask AI to help draft the comment. Do not ask AI to choose a rating or write a justification before you have independently evaluated the work.

## What Information Should You Provide?

**REQUIRED INPUTS**

1. Exact objective or competency
2. Applicable Policy 1.40 rating definition
3. Your selected rating
4. Verified examples and results
5. Employee's self-evaluation comment, with names removed

**WRITING DIRECTIONS**

- Write about the employee: “Kate demonstrated...”
- Two or three substantive paragraphs at most
- Describe work, evidence, impact, and consistency
- Balanced, professional tone
- No invented metrics, praise, incidents, or motives

If evidence conflicts, ask AI to **flag it for your review**, not to resolve it.

**COPY-AND-ADAPT PROMPT: PERFORMANCE OBJECTIVE**

I am a supervisor completing a 2026 Classified Employee performance evaluation. Help me write a concise supervisor comment about the employee using only the evidence below.
Objective (exact text): [paste]
Objective weight: [e.g., 30%]
Rating I have selected and its Policy 1.40 definition: [paste]
Verified evidence: [dates, deliverables, measures, results, documented circumstances]
Employee's self-evaluation comment, with names and identifying details removed: [paste or omit]
Organize the comment as: what was expected, what happened, which rating, and why the results support it. Do not invent or exaggerate anything, and do not change the rating. If my evidence does not appear to support the rating, or if the self-evaluation conflicts with my evidence, flag it for my review rather than resolving it.

**COPY-AND-ADAPT PROMPT: STANDARD COMPETENCY**

I am a supervisor completing a 2026 Classified Employee performance evaluation. Help me write a concise competency comment about the employee.
Competency and policy description: [paste]
Rating I have selected and its Policy 1.40 definition: [paste]
Verified examples from across the performance cycle: [2–4 specific situations, with dates and outcomes]
Follow Behavior → Example → Impact → Rating. Describe what the employee did, not their personality. Do not invent facts, results, or feedback. Tell me where my evidence does not support the rating.

## Use AI Responsibly With Employee Information

**DO**

- Remove names and identifying details
- Review both strengths and areas to improve
- Check for unsupported or biased wording
- Keep your independent judgment

**DO NOT**

- Upload confidential personnel files
- Include student records or sensitive personal details
- Ask AI to determine or reverse a rating
- Ask AI to “make it sound Extraordinary”
- Paste unverified claims into PAPERS

**PROTECT INFORMATION**

If you're unsure whether data may be shared, don't put it into the AI tool.

## Before Copying an AI-Assisted Comment into PAPERS

A polished paragraph is not necessarily an accurate one. You should be able to point to the records or observations behind every substantive claim.

- [ ] **Accurate**
  Every date, measure, example, and outcome is verified.
- [ ] **Aligned**
  The comment addresses this objective or competency.
- [ ] **Balanced**
  Strengths, gaps, and context are represented fairly.
- [ ] **Consistent**
  Language fits the rating you independently selected.
- [ ] **Safe**
  No confidential information was shared.
- [ ] **Authentic**
  It reads as your own professional judgment.

12 · Finish

# Final Review

Confirm each item before you submit the evaluation to the reviewer by December 4, 2026.

- [ ] **Job Duties reviewed for context**
- [ ] **Special Assignments have comments, if applicable**
- [ ] **Every Performance Objective has a rating and a comment**
- [ ] **All four Standard Competencies have a rating and a comment**
- [ ] **University Competencies have comments**
- [ ] **The Development Plan has a comment**
- [ ] **The employee's self-evaluation was reviewed and considered**
- [ ] **Ratings reflect the full performance cycle, January 1 – December 31**
- [ ] **Any overall Unsuccessful rating is supported by a PIP or Written Notice and reviewed with TMC and the reviewer**
- [ ] **The Overall Summary comment aligns with the Overall Rating, and you clicked Complete**
- [ ] **Any AI-assisted text was verified and contains no confidential information**

## After You Submit

| 01 | 02 | 03 |
|---|---|---|
| **Dec 7 – Dec 22, 2026** | **Jan 4 – Jan 15, 2027** | **Jan 25, 2027** |
| The evaluation routes to the reviewer for approval and sign-off. | Meet one-on-one with the employee. Walk through ratings and comments, especially where yours differ from the self-evaluation. The employee acknowledges. | The 2027 performance plan cycle launches. Carry forward-looking goals into new SMART objectives and the Development Plan. |

**A rating communicates the decision.**
**The comment explains the decision.**
**The evidence supports both.**

> **NOTES**
>
> Rating definitions: DHRM Policy 1.40, Performance Management (rev. 8/22/2025).
> Kate Simmons is a fictional example. Her ratings, weights, and comments are illustrative, not automatic rating rules.
> This guide explains concepts. Follow the employee's performance plan, Policy 1.40, and official evaluation instructions for requirements.
> Questions: **hrdept@odu.edu** · Supervisor guides: odu.edu/human-resources/policies/performance-management