

# Probationary Staff Performance Evaluations

## Key Elements Guide

The UT Performance Evaluation Tool is designed to assist supervisors in providing an accurate evaluation and feedback to new hires during their probationary period. All staff use the same five key elements which are evaluated during this process. But this guide targets emphasis on early indicators: learning, application of training, integration into the team, responsiveness to feedback, and reliability.

Use behavior-based examples and documented evidence gathered during the probationary period. This evaluation process is critical to the overall success of the university as we encourage communication between supervisors and employees. It is expected that all employees will receive performance feedback from their immediate supervisor throughout their evaluation period.

Examples of performance standards for each category are listed in this guide. While these examples are not exhaustive, they provide concepts and ideas that support the designated ratings.

Each key element is associated with one or more of the Be One UT values. The description of how these values align with the element of performance is outlined with each section.

## How to Use This Guide

- Review onboarding goals and the role's position description (PD) and work plan within the first two weeks of hire date.
- Gather evidence beginning at hire date: training completion records, work samples, ticket metrics, attendance/punctuality logs, customer feedback, and peer input.
- Rate each of the five categories (1–5). Anchor your rating to the probationary descriptors provided here.
- Provide specific, factual comments for any rating of 1 or 5; summarize strengths and short-term development actions for ratings of 2–4.
- Discuss ratings with the employee, agree on targeted actions for the next period, and document follow-up dates.

## Probationary Timeline & Expectations

90-day evaluation: Emphasize assimilation and early performance. Focus on learning curve, application of training, and reliability on assigned tasks.

180-day final probationary evaluation: Emphasize sustained performance and trajectory toward full proficiency; confirm readiness to continue employment beyond probation.

- Before the meeting: Review evidence and draft ratings/comments.
- During the meeting: Share observations, listen, agree on actions and follow-up dates.
- After the meeting: Document agreements, enter ratings, schedule next check-in.

## Documentation Standards & Conversation Tips

- Base ratings on observable behaviors and documented evidence (work samples, logs, tickets, metrics).
- For ratings of 1 or 2, include specific examples, dates, and agreed improvement actions.
- Use neutral, job-related language; avoid personal judgements.
- Separate intent from impact: acknowledge progress while addressing gaps.
- Confirm mutual understanding and summarize next steps at the end of the discussion.

## **Avoiding Common Rater Errors**

- Halo/Horn: Do not let one trait dominate the entire assessment.
- Recency: Consider the whole probationary period, not just the last week.
- Leniency/Stringency: Use the anchors consistently across employees.
- Central Tendency: Avoid clustering ratings at "3" when evidence supports higher or lower.

Ask yourself:

Am I basing my ratings on documented behaviors?

Am I evaluating each category separately?

Have I recognized my own biases?

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## Rating Structure for the Performance Review

The performance review uses a five-level rating structure to evaluate performance.



### **Distinguished Performance and Role Model Status (for a New Hire)**

Exceeds expectations for this stage; independently adds value beyond onboarding; proactively identifies improvements; requires minimal oversight.

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### **Superior/Highly Effective Performance**

Frequently exceeds early expectations; applies training quickly; collaborates well; needs limited oversight.

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### **Fully Successful/Effective Performance**

On track, meets most onboarding goals and quality standards; demonstrates reliable progress and openness to feedback.

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### **Partially Successful Performance/Needs Improvement**

Inconsistent progress on core expectations; requires frequent reminders or close supervision; development plan needed.

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**This rating requires specific examples.**

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### **Unsuccessful/Unacceptable Performance**

Fails to meet minimum probationary expectations; immediate and sustained improvement required.

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**This rating requires specific examples.**

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## Accomplishments

*Alignment with Be One UT values: Bold and impactful; excel in all we do. Focus on achieving early outcomes and demonstrating mastery of core duties.*

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### 90-Day Focus

- Completes assigned onboarding tasks and training milestones on schedule.
- Produces accurate work samples aligned to role expectations.
- Demonstrates understanding of PD/work plan; can articulate priorities.
- Applies guidance to deliver results with increasing independence.

### 180-Day Focus

- Sustains quality, timeliness, and accuracy across typical workload.
- Meets or beats target turnaround for core tasks; begins contributing to team goals.
- Shows initiative to improve processes or take on moderately complex assignments.

### Supervisor Prompts

- Which onboarding goals are complete? Which are at risk?
- What specific work samples demonstrate accuracy and quality?
- Where has the employee taken initiative beyond assigned tasks?

## **Accomplishments: Rating Anchors & Examples**

### **Distinguished Performance and Role Model Status**

Outperforms expectations for a new hire; completes complex deliverables with minimal oversight; identifies and executes improvements that benefit the unit.

Anticipates needs (e.g., preps materials, updates trackers) before being asked.

### **Superior/Highly Effective Performance**

Frequently meets/occasionally exceeds targets; handles multiple priorities without sacrificing quality; seeks stretch assignments after mastering basics.

### **Fully Achieves Expectations/Effective Performance**

Meets most onboarding goals; delivers accurate work on routine tasks; communicates status and asks clarifying questions appropriately.

### **Partially Successful Performance/Needs Improvement**

Inconsistent output or accuracy; misses several onboarding milestones; needs repeated instructions to complete routine tasks.

### **Unsuccessful/Unacceptable Performance**

Fails to complete core assignments; quality or timeliness routinely below minimum standards; limited evidence of progress despite coaching.

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## **Service and relationships, Interpersonal/Communication Skills, and Collaboration**

*Alignment with Be One UT values: Embrace diversity and foster unity; build trusted, inclusive relationships with students, customers, and colleagues.*

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### **90-Day Focus**

- Learns and follows service standards; responds to inquiries professionally and timely.
- Builds rapport with team members; demonstrates respect and active listening.
- Seeks to understand diverse perspectives; asks for feedback on communication.

### **180-Day Focus**

- Sustains positive relationships across the unit; manages routine conflicts constructively.
- Collaborates effectively on team tasks; becomes a reliable partner for cross-functional work.

### **Supervisor Prompts**

- What feedback from customers/peers supports the rating?
- How does the employee handle conflict or high-volume periods?
- What examples show inclusive, respectful communication?

## **Service & Relationships: Rating Anchors & Examples**

### **Distinguished Performance and Role Model Status**

Earns strong trust from peers/customers; proactively supports team cohesion; models de-escalation and empathy in difficult interactions.

### **Superior/Highly Effective Performance**

Frequently handles challenging customer situations with tact; invites feedback and adjusts style; contributes to a positive team climate.

### **Fully Achieves Expectations/Effective Performance**

Interacts cooperatively and professionally; manages most routine customer situations; communicates clearly in meetings and written channels.

### **Partially Successful Performance/Needs Improvement**

Displays uneven professionalism or responsiveness; struggles in emotionally charged situations; needs coaching to listen actively or collaborate.

### **Unsuccessful/Unacceptable Performance**

Interactions regularly hinder team or service outcomes; pattern of insensitive or unprofessional behavior despite coaching.

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## Accountability & Dependability

*Alignment with Be One UT values: Integrity, openness, and responsibility. How the new hire contributes to department effectiveness.*

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### 90-Day Focus

- Demonstrates punctuality and adherence to schedules; meets commitments for assigned tasks.
- Follows policies and instructions; communicates proactively about risks or delays.

### 180-Day Focus

- Maintains consistent reliability under typical workload; manages priorities and deadlines with minimal reminders; escalates issues appropriately.

### Supervisor Prompts

- What evidence (attendance logs, due dates, task trackers) demonstrates reliability?
- How does the employee communicate about risks, errors, or delays?
- What ownership behaviors are observed (e.g., closing loops, documenting decisions)?

## **Accountability & Dependability: Rating Anchors & Examples**

### **Distinguished Performance and Role Model Status**

Always delivers on time and to standard; independently tracks tasks; takes ownership and follows through without supervision.

### **Superior/Highly Effective Performance**

Almost always on time and prepared; high level of ownership for outcomes; rarely needs follow-up to complete tasks.

### **Fully Achieves Expectations/Effective Performance**

Usually meets quality and timeliness standards; needs occasional oversight; adheres to policies and guidelines.

### **Partially Successful Performance/Needs Improvement**

Often misses deadlines or requires reminders; inconsistent adherence to procedures; limited follow-through on commitments.

### **Unsuccessful/Unacceptable Performance**

Frequently late or unreliable; does not accept accountability for results; requires constant oversight to keep work on track.

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## Adaptability & Flexibility

*Alignment with Be One UT values: Optimistic, visionary, nimble, and innovative; embraces change and continuous learning.*

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### 90-Day Focus

- Learns new systems and processes; accepts feedback and adjusts quickly.
- Shows curiosity; asks clarifying questions; demonstrates resilience when priorities shift.

### 180-Day Focus

- Adapts swiftly to evolving workflows; suggests improvements; supports colleagues through change.

### Supervisor Prompts

- What changes occurred and how did the employee respond?
- What feedback did they incorporate?
- What examples show initiative in adopting or improving new processes?

## **Adaptability & Flexibility: Rating Anchors & Examples**

### **Distinguished Performance and Role Model Status**

Champions new initiatives; experiments thoughtfully; integrates feedback to enhance performance and team practices.

### **Superior/Highly Effective Performance**

Actively seeks better ways of working; positive and solution-focused during changes; guides peers informally.

### **Fully Achieves Expectations/Effective Performance**

Open to learning; follows procedures for new systems with initial guidance; maintains positive attitude toward change.

### **Partially Successful Performance/Needs Improvement**

Resists new approaches; needs repeated guidance; limited effort to improve based on feedback.

### **Unsuccessful/Unacceptable Performance**

Discourages change; avoids training; persists with outdated methods despite instructions; creates negative impact on team adaptability.

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## Decision Making & Problem Solving

*Alignment with Be One UT values: Bold, impactful, nimble, innovative; uses sound judgment and critical thinking within policy.*

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### 90-Day Focus

- Applies training and policies to make appropriate decisions on routine matters; seeks help when uncertain.
- Identifies routine problems early and proposes practical solutions.

### 180-Day Focus

- Resolves typical team/unit problems; involves stakeholders appropriately; communicates decisions clearly.

### Supervisor Prompts

- What information did the employee gather before deciding?
- How were stakeholders involved?
- What measurable impact did their decisions have on quality, timeliness, or customer experience?

## **Decision Making & Problem Solving: Rating Anchors & Examples**

### **Distinguished Performance and Role Model Status**

Independently analyzes and solves complex issues appropriate to role; anticipates risks; improves processes using data and feedback.

### **Superior/Highly Effective Performance**

Decisions are well reasoned; willing to decide when others hesitate; balances speed and accuracy; invites input without deflecting ownership.

### **Fully Achieves Expectations/Effective Performance**

Addresses routine problems and carries through solution implementation with normal supervision; gathers sufficient information before deciding.

### **Partially Successful Performance/Needs Improvement**

Delays decisions; relies on gut rather than facts; requires more than routine supervision; defaults to status quo.

### **Unsuccessful/Unacceptable Performance**

Fails to recognize or resolve routine problems; avoids decisions; does not gather necessary information; frequently makes poor decisions.

## **Recommendation: Set a Short-Term Development Plan**

### **Why Short-Term Goals Matter**

- ✓ Keeps new hires focused and motivated during probationary period.
- ✓ Provides measurable progress for 90-day and 180-day evaluations.
- ✓ Reduces surprises at final review and supports retention decisions.
- ✓ Encourages continuous feedback and development conversations.

### **Goal Set Success Tips:**

- Discuss goals collaboratively—invite employee input.
- Keep goals simple and focused on immediate priorities.
- Document goals in the evaluation form or in DASH.
- Review progress at next check-in and adjust as needed.
- Recognize achievements to build confidence and engagement.

## **5 Practical Examples of Short-Term Goals**

### **Accomplishments**

- Complete onboarding training modules by [date].
- Submit first set of reports with zero critical errors.

### **Service & Relationships**

- Shadow a senior team member for two customer interactions.
- Respond to all internal emails within 24 hours for next 30 days.

### **Accountability & Dependability**

- Maintain 100% punctuality for scheduled shifts for 30 days.

### **Adaptability & Flexibility**

- Learn and apply new software feature by next check-in.

### **Decision Making & Problem Solving**

- Document and resolve one routine issue independently using SOP.

## **Short-Term Development Plan (Template)**

Goal (30–45 days): \_\_\_\_\_

Specific behaviors/skills to improve: \_\_\_\_\_

Actions (training, coaching, job shadow, resources): \_\_\_\_\_

Owner(s): \_\_\_\_\_ Date to complete: \_\_\_\_\_

Measures of progress (quality, timeliness, accuracy, feedback): \_\_\_\_\_

Check-in dates: \_\_\_\_\_ / \_\_\_\_\_