

Assigning a Rating

■ Performance rating

- Indicates the quality of performance or competence achieved/ demonstrated by an employee

■ 1-5 scale rating system

- Allows managers to differentiate the performance of employees
- The rating assigned should most accurately reflect the employee's overall performance

■ Comments should be consistent and support the rating

- Explain why the expectation was or wasn't met
- Use metrics when possible

Rating Scale

- **5 Outstanding:** Performance during appraisal period was consistently exceptional, significantly exceeding all expectations for the position.
- **4 Exceeds Expectations:** Performance during appraisal period met all expectations and frequently exceeded some expectations for the position.
- **3 Successful/Meets Expectations:** Performance during appraisal period effectively fulfilled all expectations for the position.
- **2 Does Not Meet Expectations:** Performance during appraisal period met some, but not all expectations for the position. Performance improvement process should be initiated or continued.
- **1 Unsatisfactory:** Performance during appraisal period consistently failed to meet minimum expectations for the position. Individual lacks or did not apply knowledge, skills, or behavior expected for the position. Performance documentation process (e.g. written warning, Performance Improvement Plan) should be initiated or continued. This rating is not to be used for employees new in their position, see “NA” rating below.
- **N/A New:** Individual has not been in position long enough (at least six months) to fully demonstrate the competencies required for the position. This appraisal is provided for feedback purposes.

Rating Scale Example

Goal: Reduce expenses by 2% for fiscal year 2022.

- **5 – Outstanding:** Reduced expenses by 10% and streamlined a departmental process that reduced cycle time by 25%
- **4 – Exceeds Expectations:** Reduced expenses by 5% for the fiscal year
- **3 – Successful/Meets Expectations:** Reduced expenses by 2% for the fiscal year (Anchor)
- **2 – Does Not Meet Expectations:** Expenses remained flat for the year
- **1 – Unsatisfactory:** Expenses went up by 2% for the year