

RIT Staff Performance Appraisal Templates

Instructions and Guiding Principles

General Instructions

This web site includes links to a variety of appraisal templates. You can edit the templates to create your own customized set or sets of appraisal forms to evaluate performance and communicate in styles and formats that best fit the types of positions held by the individuals who report to you. You also can reorder the templates in a way that makes sense for you. When you have completed the editing and/or reordering, you will have created a performance appraisal document specific to the needs of your entire department or groups within your department.

There are three template formats provided; open-ended, structured response, and checklist. These formats are generally used as follows:

- **Open-Ended** – Generally recommended for supervisors with a small number of staff or supervisors as direct reports. Provides an open-ended format to evaluate performance over the year. Supervisors who prefer to provide a “free flow” narrative or have used a general performance letter will find this template a good fit.
- **Structured Response** - Generally recommended for supervisors with a small or moderate-size number of either exempt or non-exempt staff as direct reports. Provides guided questions or topics that define parameters used to evaluate performance over the year. Supervisors who prefer to communicate by providing responses to structured questions or performance measures will find this template a good fit.
- **Checklist** - Generally recommended for supervisors with a large group of exempt or non-exempt staff as direct reports. Provides a set of major performance factors with related metrics, providing the ability to rate performance on each metric or the major factor. Supervisors who prefer to communicate succinctly and in a highly structured format will find this template a good fit.

Guiding Principles

As you select and edit the template(s) you will use in the performance appraisal process, the following principles are provided as guidance. These principles represent best practices in implementing performance appraisal models and processes:

- Although the documentation component of the performance appraisal process is important, the supervisor initiates and encourages dynamic performance communication throughout the year.
- The supervisor provides performance criteria, standards, or metrics so that staff members understand what good/great performance “looks like.”
- Supervisors apply the performance appraisal policy, procedures, and tools consistently among staff or groups of staff.
- Supervisors include university core values to assess how results were achieved as well as what results were achieved