

INSTRUCTIONS FOR COMPLETING THE STAFF PERFORMANCE REVIEW FORM

The performance review form is the tool that is used by both the employee and his/her supervisor to formally document job performance and position accomplishments. The following instructions are intended to provide guidance for completing the form.

Supervisor Instructions:

Overall Process:

The forms will be sent partially populated to employees via their campus email accounts. Employees will be instructed to save the form as a word document, complete the form and then forward electronically to you, their supervisors. You may populate the forms electronically or in hard copy. Once completed by you and as noted below, you must print the form in hard copy, sign it and forward it to your Dean or President direct report.

Page 2- Page 4

Part I: Core Competencies – Skills, Knowledge and Abilities

In this section, you will rate and comment on your employee's performance as against "Core Competencies." These are fundamental job skills, knowledge, abilities and functions that are critical to the performance of your employee's job duties and contributions to the University.

1. Review each of the 5 Core Competencies that will be used to measure the employee's job performance (each is highlighted in blue).
2. For each of your direct reports, review the examples (highlighted in grey) provided by the employee of the job duties or activities performed in support of his/her performance in each Core Competency.
3. Provide written comments regarding the employee's performance for each Core Competency in the "Supervisor's Comment" section. The comments may be brief, but provide specific examples to support your comments.
4. For each Core Competency, use the Performance Definitions at the top of page 2 to assign a corresponding numeric rating in the designated section marked "Supervisor Rating" to evaluate the employee's performance.
5. If you have employees who supervise others, you will need to complete an assessment of two additional competencies described in the "Supervisors Only" section at the bottom of page 3 and top of page 4.
6. Feel free to copy and pasted additional pages into the document as needed.
7. Add the ratings you provided for each competency and divide the total by 5 for those employees who do not have supervisory responsibilities or by 7 for those employees who have supervisory responsibilities and put the score in the "Total Core Competency Rating: Final Rating" box on page 4 and on the first page next to the designation for "Core Competency Rating."

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Part II: Goal Accomplishments

In the Goals Accomplishments section, you will evaluate your employee's performance in connection with those previously outlined and established goals for the prior fiscal year (FY2010).

1. Please review the Performance Goals listed by the employee in this section (highlighted in blue).
2. Confirm that the goals listed are a complete and accurate list of the goals previously set.

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3. Review the Accomplishments for each goal listed by the employee (highlighted in grey).
4. Provide your comments citing specific examples where possible in the “Supervisor’s Comment” section for each performance goal.
5. For each Performance Goal, use the Performance Definitions at the top of page 2 to assign a corresponding numeric rating in the designated section marked “Supervisor Rating” to document the employee’s performance.
6. Feel free to copy and paste additional pages into the document as needed.
7. Add the ratings you provided for each goal and divide by the total number of goals set. Put the score in the “Total Goal Accomplishments Rating” box on page 5 and on the first page next to the designation for “Goal Accomplishment Rating.”

Page 6 – Page 7 Part III: Planning For Next Meeting – Goals For Next Fiscal Year

In this section, you and your employee will identify key individual and departmental performance goals to accomplish in the next review period (FY2011). As to timing, you and your employee may do this at this stage, at a group meeting or retreat, or at the time you meet for your review.

The University has established two campus-wide goals for all employees to accomplish in the next review period: “Demonstrated Growth in Diversity/Inclusion” and “Demonstrated Commitment to Advance the Mission and Values of the University to Students and Alumni”. An explanation of how to arrive at specific tasks and expectations to achieve these goals is contained in the document. For these and any other goals set with your employee:

1. Please list each goal after “Performance Goal” on pages 6 and 7 (highlighted in blue).
2. Identify the time frame for completion of each goal.
3. Determine the weight or importance of the goal to your overall department and your personal performance.
4. Feel free to copy and paste additional pages in the document as needed.

Final Rating Calculations

1. Turn to the first page of the form and ensure that you have filled in the Core Competency Rating and the Goal Accomplishment Rating.
2. The Overall Rating comes from multiplying the Core Competency and Goal Accomplishment Ratings by the weighted percentages already populated on page 1 of the form. The weighted percentages measure how important core competencies relative to goal accomplishments are to a particular job. Generally, the higher the level or grade of a job, the more important to performance are goal accomplishments rather than core competencies. These weightings were set at the University-level this year, but we have the ability to modify that by department or even employee in the next and future years.
3. Multiply the Core Competency Rating by the percentage weighting. Multiply the Goal Accomplishment Rating by the percentage weighting. Add the resulting numbers to determine the Overall Rating. For example, a Core Competency rating of 4 with a weighted percent of 50% ($4 \times .5 = 2$) and a Goal Accomplishment rating of 3 with a weighted percent of 50% ($3 \times .5 = 1.5$) would yield an Overall Rating of 3.5 ($2 + 1.5$).
4. After you complete all of the performance review ratings for your direct reports, please determine an overall department average by adding all overall ratings and dividing by the number of employees you supervise. **To better achieve campus-wide consistency with performance ratings, your overall average department rating should not exceed 3.5.**

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5. After you have completed your portion of the review form(s), print the form in hard copy and sign the form(s) in the designated area(s) on page 6.
6. Submit the signed form to the leadership of your area for his/her review and signature. (For College employees, provide the form to the Dean of your College. For all other areas, provide the form to the Vice President or President direct-report for the area.)
7. Final review and rating approval rests with the Vice President or President direct report. Do not notify your employees of your ratings or complete their reviews until you receive notice from Human Resources.
8. Your Vice President or President direct report will forward the approved review forms to Human Resources.
9. Human Resources will notify you of final ratings and return approved forms at the end of September or beginning of October, 2010.
10. Once you receive those documents, please set up meetings with your employees to conduct the performance review meeting.
11. Conduct the performance review meeting with your employees no later than October 15, 2010. At the conclusion of the meetings have the employees sign and date the forms.
12. Inform the employees that they have the option to provide "Employee Comments" to the review form on page 6.
13. Provide a copy of the signed form to your employee, and return the original signed form to the Human Resources Office by the "Completed Review Due to HR" listed on page 1 of the form (October 22, 2010).