Performance Evaluation Policy for Staff

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General Description

Policy Summary:

This policy outlines the process for conducting performance evaluations for staff members, detailing the responsibilities of supervisors, staff, and the Human Resources department. The goal is to ensure that performance evaluations are carried out consistently, fairly, and effectively, providing valuable feedback for professional growth and organizational improvement.

Purpose:

The purpose of this policy is to establish and maintain a structured and effective performance evaluation program that:

- Promotes open and constructive communication between supervisors and staff.
- Identifies strengths, development needs, and opportunities for career growth.
- Supports continuous improvement in job performance and alignment with organizational goals.
- Ensures that employees receive clear feedback and guidance for improvement.
- Enhances accountability and recognition of contributions to organizational success.

This policy aims to improve employee performance, job satisfaction, and organizational effectiveness.

Scope:

This policy applies to all regular staff employees (both exempt and non-exempt).

Exceptions:

None.

Responsible Department:

Human Resources

Policy Content

Overview

Performance evaluations will be conducted annually for all regular staff employees of the University. The annual performance evaluation process is essential for providing employees with a comprehensive assessment of the past year. The process is designed to provide an assessment of an employee's work concerning pre-established standards and expectations for the position, reflect on the past year's achievements, identify any areas for improvement, establish training needs, establish and communicate clear performance expectations and goals for the future, and seek input and feedback from employees as appropriate. Furthermore, the process aids in the merit review process's promotion, retention, and salary decisions.

While annual performance evaluations are an important tool for a supervisor to formally communicate (in writing) expectations, goals, and performance, they should not replace ongoing regular conversations with employees. Supervisors are expected to provide employees relevant feedback and engage in shared dialogue throughout the year.

Requirements

1. All performance evaluations are completed in Workday no later than the established due date of each year.
2. Performance will be used to calculate merit; therefore, all performance evaluations must have an overall rating. The language on the evaluation must be consistent with the overall rating. Workday will automatically calculate an overall rating.

Responsibilities and Procedures

Employee Responsibilities

1. Before evaluation, completes the Optional Pre-Evaluation Form in Workday
2. If desired, provide appropriate feedback on the evaluation upon receipt and may comment in Workday on the performance evaluation

Supervisor Responsibilities

1. Annually conduct performance evaluations in Workday for all direct reports.

    a. Meets with each staff member to discuss the formal evaluation, achievements of the past year, any areas for improvement, next year's goals, and potentially longer-term goals.

b. Encourages employee feedback as appropriate.
c. Completes and submits all applicable performance evaluations in Workday by the deadline established each year.
d. Ensure that all applicable performance evaluations have an overall rating and that language on the evaluation is consistent with that rating.

2. Conducts ongoing conversations of expectations, makes written performance evaluation updates, and/or makes performance notes in the employee's department file an employee's performance reflects a significant improvement or decline at any time throughout the year.

Human Resources Responsibilities

1. Annually sends performance evaluations in Workday to supervisors to complete
2. Does training either electronically or in person
3. Assures all performance evaluations are completed in Workday

Vice President Responsibilities

1. Annually ensures that all applicable employees have been evaluated for the preceding year.

Impact of Disciplinary Actions on Merit Increases
Employees on a written discipline warning, including a performance improvement plan, may not be eligible for an annual increase during the evaluation period. However, at the manager's discretion and in consultation with Human Resources, an increase for an employee on a disciplinary warning, including a performance improvement plan, may be considered provided they have significantly met and sustained performance expectations.

Employees on a final written warning during the evaluation period are not eligible for an annual increase.

Performance Evaluation

Consequences of Policy Violation:

Supervisors who have not submitted their employees' evaluations in Workday by the established due date will not receive their merit increase until July 1st. If the evaluations are not completed in Workday by July 1st, merit will continue to be delayed until all evaluations have been completed in Workday. Once submitted, merit will be effective with the payroll date following submission of all evaluations.

Merit will also be delayed for any employee whose Title IX training has been assigned and not been completed by June 1st. It will then become effective with the payroll date following completion of the training.

Terms & Definitions

Terms and Definitions:

Term:	**Definition:**
Rating Period	The performance evaluation period for all staff employees will be January – December.
Performance Evaluation Rating	• *Rating 1: Unsatisfactory* - Does not meet job requirements. Immediate and significant improvement is required or employment is in possible jeopardy. • *Rating 2: Needs Improvement* - Inconsistent in meeting job requirements. Meets some requirements and minimally meets others. • *Rating 3: Effective Satisfactory* - Meets all job requirements. This is the expected level of performance for all employees. • *Rating 4: Highly Effective* - Consistently meets and frequently exceeds job requirements. • *Rating 5: Outstanding* - Consistently exceeds expectations and requirements. Truly outstanding.

Related Documents

Related Documents:

Document Type:	Document Name:	Document Number:
Policy	Employee Discipline and Concerns Policy	HMRS-0014

Revision Management

Revision History Log:

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v3.0	9/18/2023 2:24 PM	Pamela Mota
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Vice President Approval:

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