



Performance Evaluation Policy for Staff

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General Description

Policy Summary:

This policy provides information about performance evaluations for staff and outlines the responsibilities of the various parties involved in the evaluation process.

Purpose:

The purpose of this policy is to provide for the administration of an effective performance evaluation program.

Scope:

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

Exceptions:

None.

Policy Content

Overview

Performance evaluations will be conducted annually for all regular staff employees of the University. The annual performance evaluation process is an essential tool for providing employees with a comprehensive assessment of the past year. The process is designed to provide an assessment of an employee's work in relation to 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 promotion, retention, and salary decisions used in the merit review process.

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 with relevant feedback and engage in shared dialogue throughout the year.

Requirements

1. All signed reviews must be submitted to Human Resources (HR) no later than the established due date of March 15th, or the next business day.
2. Performance will be used to calculate merit, and therefore, all performance evaluations must have an overall rating. The language on the evaluation must be consistent with the overall rating. A form that automatically calculates an overall rating is available on the HR website. (<https://inside.trinity.edu/human-resources/form-directory>). However, the supervisor may write a summary paragraph describing performance, upcoming goals, developmental and training opportunities/requirements.

Responsibilities and Procedures

Supervisor Responsibilities

1. Annually conducts written performance evaluations 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 goals, and potentially longer-term goals
 - b. Encourages employee feedback as appropriate
 - c. Completes and submits all applicable performance evaluations to Human Resources no later than March 15th, or the next business day.
 - d. Ensures all applicable performance evaluations have an overall rating and the 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 if, at any time throughout the year, an employee's performance reflects a significant improvement or decline

Employee Responsibilities

1. Prior to evaluation, completes the Optional Pre-Evaluation Form or informally provides written input to the supervisor

2. If desired, provides appropriate feedback of the evaluation upon receipt and may attach written comments to the performance evaluation form

Human Resources Responsibilities

1. Annually sends a general reminder to supervisors to complete the performance evaluations
2. Electronically distributes a performance evaluation training module
3. Receives all evaluations for inclusion in each staff member's personnel file

Vice President Responsibilities

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

Performance Evaluation

Consequences of Policy Violation:

Supervisors who have not submitted their employees' evaluations to HR by the established due date will not receive their merit increase until July 1st. If the evaluations are not submitted to HR by July 1st, merit will continue to be delayed until all evaluations have been received by HR. 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	<ul style="list-style-type: none">• <i>Rating 1: Unsatisfactory:</i> Does not meet job requirements. Immediate and significant improvement required or employment in possible jeopardy.• <i>Rating 2: Needs Improvement:</i> Inconsistent in meeting job requirements. Meets some requirements and minimally meets others.• <i>Rating 3: Effective Satisfactory:</i> Meets all job requirements. This is

Term:	Definition:
	the expected level of performance for all employees. <ul style="list-style-type: none">• <i>Rating 4: Highly Effective:</i> Consistently meets and frequently exceeds job requirements.• <i>Rating 5: Outstanding:</i> Consistently exceeds expectations and requirements. Truly outstanding.

Revision Management

Revision History Log:

Revision #:	Date:	Recorded By:
v2.0	4/8/2020 6:51 AM	Gary Logan
v1.0	2/28/2020 4:23 PM	Rachel Rolf

Vice President Approval:

Enter Vice President(s) that are responsible for approving this document

Name:	Title:
Gary Logan	Vice President for Finance & Administration