

**Staff Performance Evaluations
2012 Process Guidelines for Supervisors**

- ◆ **EVALUATION PERIOD:** The time frame for conducting and completing evaluations is: **February 13 through May 31, 2012**. Forms, guidelines and resources are available on the Human Resources website at www.hmc.edu/hrforms.
- ◆ **REVIEW PERIOD:**
 - **New Hires:** If a new staff member completed his/her initial review period within the past 12 months and received a written performance evaluation, you may either (1) complete another performance evaluation form, or (2) add an addendum to the initial review period evaluation.
 - **Continuing Staff:** the review period covers the **prior 12 months** from the date of the last evaluation.

◆ **WHAT'S NEW FOR 2012:**

- You have **three staff evaluation forms** from which to choose to document the evaluation.
 - Form A – each performance factor is assigned at least one level that describes the staff member's performance. A section for comments follows each factor.
 - Form B – a narrative is written for each performance factor.
 - Form C – the entire evaluation is written in a narrative format
- **Overall Rating:** Each form has a section in which you will need to select one or two performance levels that describe each staff member's overall performance evaluation.
- **Self-Evaluation:** If you want your staff member (s) to complete a self evaluation, you may use the ready-made form that has been available in the past, or design your own form selecting questions from the menu of questions on the HR website and using the self-evaluation template.

◆ **STEPS IN THE EVALUATION PROCESS:**

1. **Check with your Vice President/Supervisor:** Make sure you know what your Vice President/Supervisor expects you to do, and if staff will be required to complete a self evaluation. Confirm if your Vice President/Supervisor wants to see the evaluation at any stage of the process and sign off as the Reviewer.
2. **Set the Stage with Your Staff Member(s):** Meet briefly with each of your staff members to let them know when you will be doing evaluations, what you expect regarding a self evaluation, and the period of time that spans the review period.
3. **Staff Self Evaluation:**
 - Decide whether you will ask your staff to complete a self-evaluation and if you use the HMC self-evaluation form or design one.
 - The self-evaluation should be completed and returned to you prior to the date of the formal evaluation meeting.
 - Attach the completed self-evaluation with the final evaluation to the Human Resources Office.

4. **Prepare:** Read the staff member's self evaluation, last evaluation, prior evaluations if applicable, job description, and any notes, letters, and documents pertaining to the staff member's performance over the review period. If you need to contact others to obtain feedback about a staff member's performance, identify who they are and what you want to ask them.
 5. **Completing the Evaluation Form:** Complete the form prior to your meeting with your staff member. To help your staff member understand your assessment of each performance factor, we strongly recommend that you add comments that contain specific examples for each performance factor that support your assessment. If you are struggling with what to write, check the *Guide to Defining Performance Levels* on the HR website.
 6. **Spell Check!** The evaluation form is "unprotected" in Word which means you can spell check what you write and make corrections. Please do not modify other text in the form.
 7. **Meet with Your Staff Member:** Use the evaluation form and the self-evaluation to guide your discussion. Make sure you schedule enough time to have a productive conversation and that you meet in a private location. Remember to: listen, ask for clarification, and express your appreciation for your staff member's participation in the meeting.
 8. **Revise the Evaluation:** As you finalize the evaluation, make any changes that are a result of your meeting.
 9. **Signatures:**
 - After you complete all sections, sign in the space "Supervisor's Signature."
 - Confirm whether your Vice President/Supervisor will review each evaluation and sign and/or comment in the Reviewer's section on the form.
 - Have your staff member sign and add comments (comments are optional). The staff member's signature signifies that the individual read the evaluation.
 10. **Addressing Areas that Need Improvement:** An assessment that notes a need for some or major improvement should be followed up with a work plan to provide guidance to your staff member on what needs to be addressed, when, and the expected outcome. A sample *Performance Improvement Plan* is available on the HR website on the "Performance Evaluation Forms and Resources" page.
 11. **Copies and Filing:**
 - Please make sure each staff member receives a copy of the final evaluation.
 - The original performance evaluation and all attachments are maintained in the staff member's employment record in the Human Resources Office.
- ◆ **NEED HELP? – Please contact:**
- Cynthia Beckwith, extension 18512, email: cynthia_beckwith@hmc.edu
 - Kimberly Taylor-Rogers, extension 74096, email: kimberly_rogers@hmc.edu
- ◆ **ADDITIONAL RESOURCE:**
- The Performance Appraisal Question and Answer Book, A Survival Guide for Managers, Dick Grote, 2002
Available from: Amazon.com [\$10.19] and online from Honnold/Mudd Library