



2014 STAFF PERFORMANCE EVALUATION PROGRAM

WHEN: Begins in February and ends May 31, 2014. Evaluations should be completed prior to supervisors being asked to recommend annual salary increases.

WHY: Documented performance evaluations are communication tools that ensure the supervisor and his/her reporting staff members are clear about the requirements of each staff member's job. The evaluation also communicates the desired outcomes or outputs needed from each staff member's job and defines how they will be measured. The annual performance evaluation is just one part of comprehensive performance management which also includes having well-written job descriptions, regular performance feedback, goal setting, recognition, and job and career development.

WHAT: The available resources for documenting the performance evaluation are:

1. **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
2. **Staff Self-Evaluation - Options:**
 - Use the **standard form** that is pre-populated with questions
 - Use the standard form that is pre-populated with questions and modify it to suit what you want to know from your staff.
 - Create your own self-evaluation form. You can select questions from the standard form and/or from a menu of questions available online, and/or add your own questions. A blank template is available for your use.

HOW:

1. **Check with your Vice President/Supervisor:** Make sure you know what is expected of you and ask if your Vice President/Supervisor wants to see your staff's evaluations. Check if you are expected to use a specific form.
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. **Prepare:** Read the staff member's self-evaluation, last evaluation, prior evaluations if necessary, 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.

4. **Completing the Evaluation Form:** We recommend that you 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*** and ***How to Structure Feedback and Set Goals*** on the HR website.

5. **Meet with Your Staff Member:** Use the evaluation form and the self-evaluation to guide your discussion. You may also want to refer to the job description during your meeting. 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.
6. **Finalize the Evaluation:** As you finalize the evaluation, make any changes that are a result of your meeting. Don't forget to use spell check! Please do not modify other text in the form.
7. **Signatures and Copies:**
 - When the evaluation is finalized you and your staff member sign the evaluation.
 - Please make sure each staff member receives a copy of the final evaluation and send a copy to the Human Resources Office. Attach applicable documents, e.g. the staff member's self-evaluation.
8. **Addressing Areas that Need Improvement:** Consider developing a performance improvement plan when a staff member's performance is out of alignment with expectations and the goals of the department and/ or College. The plan can be a means of assisting a staff member to assume personal responsibility for improving and/or correcting performance issues and use available resources effectively. The staff member should be involved in developing the plan.

The following topics are usually included in a performance improvement plan:

- Define the issue – give examples
- Establish expectations – describe what the desired level of performance looks like
- Establish timelines
- Develop an action plan with goals and objectives
- Decide how you will assess success
- Make sure you have a mutual understanding of what is in the plan
- Give regular feedback on the staff member's progress

NEED HELP? – Please contact:

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