Changes to this year’s process

- Moving from 3-point to 5-point rating scale
- Implementing new review form
- Campus-wide consistency in the meeting process

5-point rating scale

- Rationale
  - Allows reviewing manager to better differentiate levels of performance
  - Simpler, straightforward language
  - Most common scale used among our benchmark schools
  - Terminology was most common among our benchmark schools
  - Staff Advisory Committee supports this change
- Applies to
  - Institutional values
  - Core Competencies
  - Organization Goals
  - Job Responsibilities
  - Overall Performance Rating
- Rating details

  1 = Unsatisfactory
  Performance consistently falls below the acceptable standards. Significant improvement is needed.

  2 = Needs Improvement
  Performance sometimes meets the acceptable standards, but often does not.

  3 = Meets Expectations
  Performance regularly meets the acceptable standards for the position and *may occasionally exceed the standards*.

  4 = Exceeds Expectations
  Performance always meets the acceptable standards and often exceeds the standards.

  5 = Exceptional
Performance consistently and significantly exceeds the standards for the position. Performance in this area is clearly superior to almost all other employees.

Performance Review Form
- Simpler, easier to complete
- Color-coded for supervisor, employee input
- Portrait orientation

Performance Review Process
- In the past, some flexibility was allowed
- This year we’ll strive for consistency across the University
  - Supervisor schedules the review meeting with employee at least 2 weeks in advance
  - Employee and supervisor exchange completed review forms 24 hours before review meeting
    - Employee submits self-review to supervisor
    - Supervisor submits draft review to employee
  - Meeting is held. Supervisor and employee discuss
    - Performance in the past year
      - Animating the mission
      - Demonstrating skill in the core competencies
      - Performance against goals
      - Performance of job responsibilities
      - Other achievements
      - Area for improvement
    - Plans for next year
      - Supervisor combines employee and supervisor comments onto single form (stapling still accepted if necessary)
        - Provides combined review to employee
        - Employee adds comments as needed
        - Employee and supervisor sign the final form
      - Supervisor provides copy to employee, sends original to department head
      - Department head sends all reviews for department to the dean or division leader
      - Dean or division leader sends all reviews to their Senior Executive Team (SET) member
      - SET member sends all reviews to Human Resources
  - Every staff member should be reviewed

Training
- As always, HR will facilitate sessions to help employees understand not only these changes, but the performance management process in general
- Classes for employees and supervisors
  - 6 sessions scheduled for the week of March 27
Register on the Performance Management tab of the HR web site

Questions should be addressed to employees’ respective HR Business Partners, Rachel Luckey and Jim Hartman