Performance Review Process 2023



Where do I find Performance Review Information?

- From the employee hub page
- Choose 'Human Resources'
- Then choose 'Human Resources Website'
- Select Manager Resources
- You'll find "Performance Management" in the left-side navigation list
 - Forms, FAQs and other helpful material are located on this page



In years where the merit pool is small, or perhaps non-existent, why do we have performance reviews?

- Provides a record of performance for a particular year
- Sets common understanding between employee and supervisor for goals and behavior



 Builds a foundation of open and continued communication and follow-up

Performance Review Forms

- There are two options for the performance review form
 - Annual Performance Review Form
 - Abbreviated Annual Review Form
- Supervisor chooses which form will be used
- Both forms cover the same categories
 - Institutional Values
 - Core Competencies
 - Organization and Individual Goals
 - Job Responsibilities
 - Overall Performance Rating



 Both forms are available on the Performance Review page of the Human Resources web site

Abbreviated Form

- Employee and supervisor provide ratings for each category above
- But there is only one section to describe and explain performance.
- One section to cover
 - Institutional Values
 - Core Competencies
 - Job Responsibilities
 - Goals
 - Overall comments



Performance Review Process

- Supervisor schedules the review meeting
- Employee and supervisor exchange completed review forms 24 hours before review meeting
- Annual review meeting is held
- Supervisor combines employee and supervisor comments and ratings onto a single form
 - Provides combined review to employee
 - Employee adds comments as needed
 - Employee and supervisor sign final form
- Supervisor provides copy of final version to employee, sends original to department head



Performance Review Process

Final steps

- Department head sends all reviews for department to the Dean or division leader
- Dean or division leader sends all reviews to their SLC member
- SLC member sends all reviews to Human Resources



Performance Review Timeframe

April 1st - June 30th

Check with your supervisor

Division leaders may have a division specific timeframe for completing reviews



Xavier's 5-Point Scale

1 = Unsatisfactory

• An overall rating of 1 means significant improvement is needed and the employee will be placed on a PIP (performance improvement plan)

2 = Needs Improvement

• A PIP (performance improvement plan) may be needed for an overall rating of 2

3 = Meets Expectations

• Where the majority of employees fall, both in overall rating and in most categories

4 = Exceeds Expectations

• Reserved for those who **consistently** exceed expectations

5 = Exceptional

- Reserved for performance that is **<u>excellent</u>** or **<u>extraordinary</u>**
- It does not mean just 'very good' performance

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Xavier's 5-Point Scale

- Applies to
 - Institutional Values
 - Core Competencies
 - Organization and Individual Goals
 - Job Responsibilities
 - Overall Performance Rating



Before Meeting

During Meeting

After Meeting

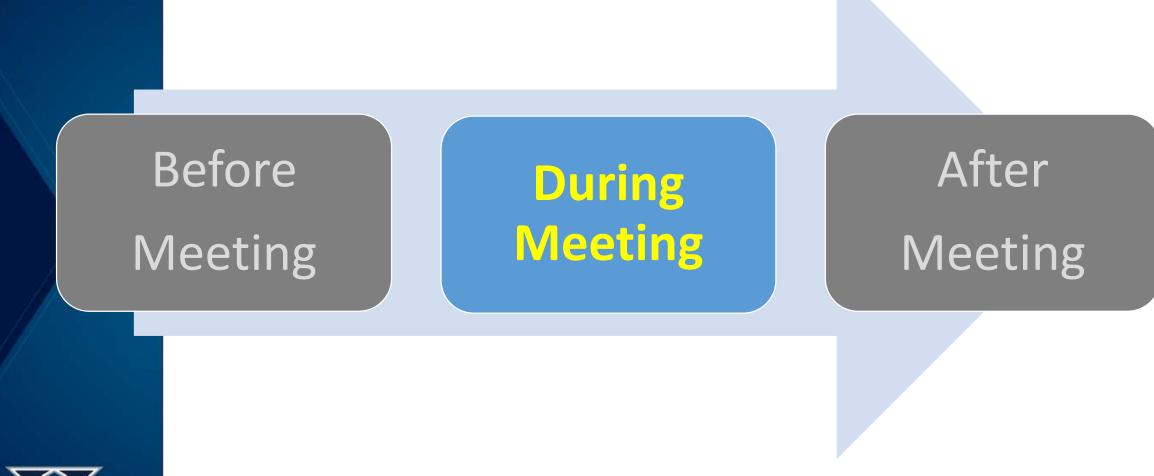


Planning & Preparation

Completing your self-assessment

- Block out time write self-assessment
- Know your position
- Refer to notes, status reports, etc.
- Be thorough, honest and specific
- Showcase your performance







Performance Review Meeting

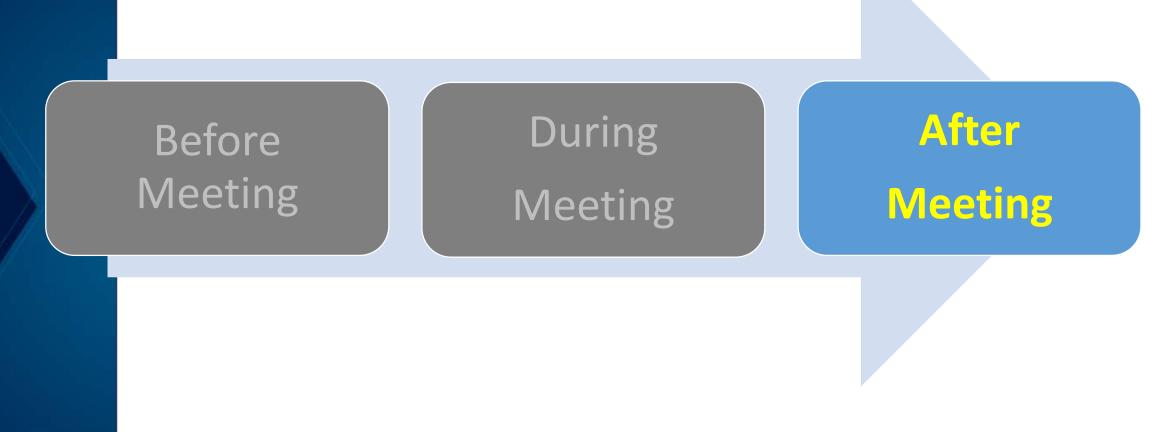
- Participate
- Make this a 2-way conversation
- Ask questions
- Listen





Set an appointment to discuss and document goals for next year And remember: Goals are fluid







After the Meeting

- Supervisor combines employee and supervisor comments onto the form
- Employee and supervisor sign the final review form
- Supervisor provides copy to employee, sends original to department head





Questions about the performance review process should be directed to the Office of Human Resources at <u>hr@Xavier.edu</u>.



ALL FOR ONE