Staff Annual Performance Evaluation

July 13 and 14

Office of Human Resources
Topics for Today...

- History of the Performance Evaluation Document
- Why Evaluate?
- Review of the Annual Performance Evaluation Instrument
- Planning for Goal Setting
Topics for Today...

- Timelines
- Strengths
- Summary
Goals for Today

• Share History of the New Annual Performance Evaluation System
• Review the New Annual Performance Evaluation Document
History

• Last fall, President Davis, along with the Vice Presidents, met with the Staff Advisory Council (StaffAC) and the Office of Human Resources, to examine the information provided in the 2015 *Great Colleges to Work For* survey.

• One of the recommendations from that meeting was to modify the performance evaluation instrument.

• A Staff Performance Evaluation Committee was established to amend the current performance evaluation instrument to:
  – Incorporate staff member understanding of University and departmental goals;
  – Support staff member professional development;
  – Recognize staff member strengths, and staff member contributions to the strategic objectives of the University.
Staff Performance Evaluation Committee Members

• Jim Benes, Supervisor of Second-Shift Custodians, Facilities Services;
• Robert Bierly, Assistant Vice President for Human Resources;
• Susan Cooper, Executive Assistant for Finance and Administration;
• Kristen Davis, Human Resources Generalist;
• Leander Jones, Human Resources Assistant Generalist;
• Dr. William Pierce, Professor and Chair, Health Sciences; and
• Kyra Zollman, Systems Specialist, Information Technology Services and Chair of StaffAC.
# Chronological History of Committee’s Work

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**October 2015**

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  - gather instruments from other institutions; and
  - collect data on best practices.

**November 2015**

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<td>HR Representatives met with supervisors representing seven divisions, along with members of the StaffAC, to receive feedback on the performance evaluation instrument. A subsequent meeting with the Committee was held to discuss the feedback and incorporate suggested changes to the document.</td>
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- **Presented instruments to supervisors.**
- **Presenting instrument to staff.**
Why Evaluate?

- Celebrate successes;
- Enables staff members to see how they add value to the University;
- Strengthens overall relationship between supervisor and staff member;
- To determine developmental needs, training, and set goals;
- To determine eligibility for annual salary increases;
- To advance staff member professional growth;
- To improve performance.
Committee Considerations

- Communication;
- Flexibility;
- Job specific;
- Professional growth;
- Institutional values;
- Rating;
- Scoring;
- Goal setting.
Annual Performance Evaluation

Explanation of the New Annual Performance Evaluation Instrument
Planning for the Preliminary Goal Setting Meeting

• **Prior to September 1,**
  – Meet with staff member to establish three (3) to five (5) goals;
  – Review the Job Description;
  – Review Last Year’s Goals;
  – Select Competencies;
  – Write SMART Goals.
All staff are evaluated on Furman Core Competencies

- One Furman;
- Collaboration;
- Communication;
- Institutional Values;
- Professional Growth;
- Service.
Job-Specific Core Competencies

- Select five (5) competencies

- Accountability;
- Decision Making;
- Flexibility;
- Fiscal Responsibility;
- Initiative and Motivation;
- Job Skills and Knowledge;

- NCAA/Southern Conference Compliance;
- Operation and Maintenance of Equipment;
- Safety;
- Security;
- Work Productivity.
Supervisory Core Competencies

• Select a minimum of three (3)
  – Development and Training;
  – Leadership;
  – Performance Management;
  – Quality Improvement; and
  – Resource Management.
Writing SMART Goals

Specific
Measurable
Action-Oriented
Realistic
Time-Bound
The Ratings

• Three ratings
  – Needs Improvement – One (1) Point
    • Document with specific examples
    • Write an Individual Performance Improvement Plan
  – Accomplished Performance – Two (2) Points
    • *This rating is the norm for most staff members!*  
    • *This rating represents QUALITY performance*
  – Exemplary Performance – Three (3) Points
    • *This rating is the exception, not the norm!*  
    • Document with specific examples
Overall Rating

44-74  Needs Improvement

75-114  Accomplished Performance

115-132  Exemplary Performance
# Timelines

<table>
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<tr>
<th>Date</th>
<th>Event Description</th>
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<tr>
<td>April 1</td>
<td>Period to be considered for Performance Evaluation</td>
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<td>Supervisor conducts mid-year meeting for staff members who received a “Needs Improvement” Rating or to advise staff member who is displaying “needs improvement” behavior in current performance review period.</td>
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<tr>
<td>September 1</td>
<td>Goal Setting</td>
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<tr>
<td>March 31</td>
<td>Evaluation Meeting Period</td>
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<tr>
<td>March 31</td>
<td>Plan for evaluation meeting and write evaluation.</td>
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<tr>
<td>May 15</td>
<td>Evaluations due to Office of Human Resources</td>
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<td>May 15</td>
<td>Conduct evaluation meeting.</td>
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## Goal Setting

- **Establish three (3) to five (5) developmental goals.**
- **Identify five (5) additional competencies from supervisory and/or job-specific competencies.**

## Coaching and Feedback
Strengths of New Instrument

- Advanced communication between supervisor and staff member for collaborative identification of core competencies and developmental goals;
- Core competencies which incorporate institutional initiatives and are essential for success at Furman;
- Flexibility to customize instrument to meet the assessment needs of the respective staff member;
- Multiple core competencies from which to select that relate to staff member’s specific job;
- Supervisory competencies to assess ability to manage and lead;
Strengths of New Instrument, Continued

• Specific defined behaviors for each competency;
• Essential developmental goals section to support expansion of staff member job-related skills, knowledge and abilities;
• Improved professional growth allows supervisor and staff member to discuss, identify, define and measure developmental goals;
• Ratings definitions to encourage staff member value and appreciation for work;
• New quantitative scoring scale.
Objectives for Today

• Understand the process you and your supervisor will use to complete the Annual Performance Evaluation;
• Understand timelines;
• Be able to write SMART Goals;
• Understand all competencies, behaviors and ratings.
Who to Call...

Robert “Bud” Bierly – Assistant Vice President for Human Resources
Kristen Davis – Human Resources Generalist
Leander Jones – Human Resources Assistant Generalist