

Step 1: Review and Select Competencies with Staff Member

Step 2: Start Performance Review

Step 3: Set Review Content (Identify SMART Goals)

Step 4: Set Review Content (Review Staff Member Goals)

Step 5: Start Performance Review (with the Option to get Feedback)

Step 6: Complete Manager Evaluation for Performance Review

Step 7: Provide Employee Comments

Step 8: Provide Manager Comments and Submit



Instructions for Completing Step 1 of the Annual Performance Evaluation Process

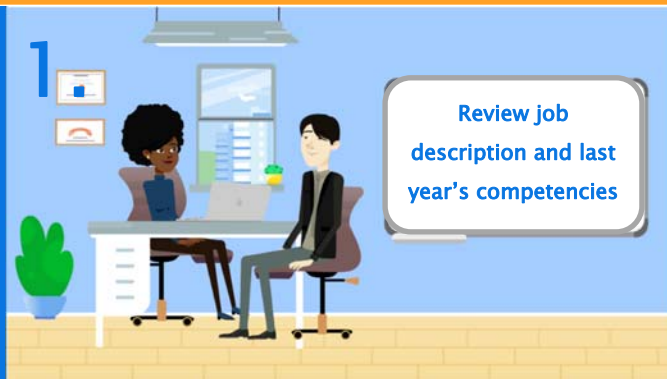
Purpose and Time Frame

Purpose: To discuss and identify the competencies on which the staff member is to be evaluated.

Ideal time frame: Late summer—prior to **September 1**.

To Do List

- 1) Meet with direct report to review job description and last year's competencies;
- 2) Determine whether competencies should be confirmed, modified, or identified.
- 3) Complete the online competency selection form.



Modify or Identify Competencies?

There are circumstances under which no competencies were applicable, no longer applicable, or not available. Are any of the four scenarios to the right applicable to your direct report(s)?

2. Do Competencies Need to be Updated?



New to Furman?
Hired after April 1?



Different Position?
Promoted?
Same type of job, but in different department?



Evaluation Eligible?
Hired after March 1?



Same Position, Different Focus?
Focus on different skills or behaviors?

Once that exercise is complete, please complete the online competency selection form.

3.



2019-20 Annual Performance Evaluation Competency Selection
To be completed by the supervisor the April 1, 2019 to March 31, 2020 evaluation period

Online Competency Selection Form

The link to the online form was sent to each supervisor via e-mail. The form shall be completed for each direct report.

Please enter the first name and the last name of the staff member to be evaluated.

First Name of Staff Member

Last Name of Staff Member

Yes

No

Completing the Form

Enter the first and last name of the staff member. Answer "Yes" or "No" to the question of whether the competencies shall be updated, then advance the screen. If the answer is "No" the form is complete. If the answer is "Yes" complete the remaining information.

Supervisory Responsibilities?

Answer "Yes" or "No" to the question of whether the staff member has supervisory duties. If the answer is "Yes" then select no fewer than three (3) supervisory competencies.

Does the Staff Member have responsibilities for supervising staff members (not students)?

Yes

No

- Accountability
- Decision Making
- Fiscal Responsibility
- Flexibility
- Initiative and Motivation
- Job Skills and Knowledge
- NCAA/Southern Conference Compliance
- Operation and Maintenance of Equipment
- Safety
- Security
- Work Productivity



Job-Specific Competencies—No Supervisory Responsibilities

Select five (5) Job-Specific competencies.

- Development and Training
- Leadership
- Performance Management
- Quality Improvement
- Resource Management
- Accountability
- Decision Making
- Fiscal Responsibility
- Flexibility
- Initiative and Motivation
- Job Skills and Knowledge
- NCAA/Southern Conference Compliance
- Operation and Maintenance of Equipment
- Safety
- Security
- Work Productivity



Job-Specific Competencies—Supervisory Responsibilities

Select no more than two (2) Job-Specific competencies.

11 Total Competencies

Staff members will be evaluated on the six (6) Furman Core Competencies, along with the five (5) elective competencies identified, for a

1 Build One Furman	2 Collaboration	3 Communication	4 Institutional Values	5 Professional Growth	6 Service
7 Elective	8 Elective	9 Elective	10 Elective	11 Elective	

Authentication

Once the competencies are selected, type your name in the space provided to affirm that you are the supervisor and discussed the selected competencies with the staff member, then advance the page.

By printing your name here, you authenticate that you are the supervisor and have discussed the selection of these competencies with the above-referenced staff member.

Supervisor's Name

What happens with the information?



What Next?

The five (5) elective competencies will be uploaded by the Office of Human Resources in Workday into the staff member's position qualifications. The next step, **Step 2: Start Performance Review**, will be executed by the Office of Human Resources. Supervisors will be notified when the review has been started.

Staff members shall then complete **Step 3: Set Review Content**. Action next required by **supervisors** will be **Step 4: Set Review Content (Review Staff Member Goals)**.

Step 4: Set Review Content (Review Staff Member Goals)

Questions?

If you have any questions, please send an e-mail to humanresources@furman.edu.

