

Staff Performance Management Tool Instructions

Job Description and Essential Functions

Supervisors are required to review the staff employee's job description at the time of hire and annually at the time of performance evaluation. In addition, supervisors are required to identify or confirm the "essential functions" and duties of the position. This should be done before completing the performance evaluation.

Guidelines and an analysis worksheet for identifying essential functions can be found on the HR forms [website](#). Additionally an on-line tutorial for identifying essential functions can be found at [Video: Essential Functions Worksheet](#)

Rating System:

There are four rating categories: outstanding, exceeds expectations, meets expectations, and below expectations. An employee should be rated on each core performance value and contribution to business goals, and then given an overall performance assessment. Please see the first page of the performance management tool for a detailed description of each rating category before beginning the performance evaluation.

The importance of each core performance value and establishment of business goals will vary from position to position and department to department. As such, the supervisor should use his/her judgment and take into consideration whether the position requires a greater skill in a particular performance value, the performance values that are most critical to the position and business goals that have the greatest impact on the unit and University when determining performance assessments. An explanation is required for all performance assessments.

Staff Performance Management Tool and Assessments

Core Performance Values

The core performance values are the core competencies required of all staff employees regardless of their position and are defined on page 2 of the performance evaluation tool.

Established Business Goals:

The established business goals section is used to review the employee's performance that contributed to department or University business goals established during the last performance evaluation period. These goals will differ

from department to department, and will be rated on the same scale as the core performance values.

Overall Assessment:

The overall assessment is assigned to indicate the employee's overall performance during the entire assessment period and should reflect the combined core performance values and contribution to business goals assessments.

Explanations are required to support all ratings and overall assessments. Consistent with the Staff Performance Management Policy (insert link), if an employee receives an Overall Performance Assessment of Below Expectations, a Performance Improvement Memorandum should be issued to the employee and employee will be deemed to be on a final warning. Supervisors should consult with Human Resources for approval prior to issuance of any final warning or termination.

Future Business Goals:

The future business goals section is used to establish goals for the employee to progress toward or accomplish within the next evaluation period.

Individual Development Plan

List all professional development planned for the employee for the next evaluation period. For each professional development goal, provide a brief description and action plan.

The Staff Performance Management Tool and goal setting guidelines and worksheet can be found on the HR forms [website](#). Additionally, on-line tutorials for completing the performance management tool and goal setting can be found on the HR forms [website](#). These online tutorials include: [Video: PMT Core Performance Values Assessments](#), [Video: Setting Goals to Meet Business Objectives](#), [Video: Assessing Business & Individual Goals](#), [Video: Overall Performance Assessment](#), [Video: Individual Development Plan](#), [Video: Conclusion](#)

Process:

The performance management tool is available electronically on the HR website, and it can be saved, printed or scanned. The employee can use the same tool to complete a self-assessment and bring to the performance discussion that takes place with their supervisor. There should be open discussion regarding performance ratings, goals, professional development and overall assessment. The completed performance evaluation should be signed and reviewed by the appropriate parties, and submitted to human resources for review and placement in the employee's personnel file.