Performance Evaluation Instructions

January 1, 2016 – December 31, 2016

Purpose of Performance Evaluations

Jacksonville State University (JSU) strives for continuous improvement as a learning-centered community committed to developing the ability to think critically, solve problems creatively and collaboratively, and communicate effectively. We should exhibit this mission in all we do and in all relationships. It is important that all employees understand how what they do each day contributes to the achievement of JSU's goals in a manner demonstrating our values. While feedback is on-going, it is important to have a face-to-face discussion each year that is captured in writing to ensure that individuals and managers have a common understanding of progress.

The performance evaluation is intended to be a fair and balanced assessment of an employee's performance. It is a time for supervisors and employees to give and receive feedback clarifying job duties, stating management's expectations, and set goals for the coming year. To accomplish a fair and balanced assessment, management must provide the employee an opportunity to express his/her opinions about the employment relationship.

Essential Elements of Performance Evaluations

- **Employee Self-Assessment**

The self-evaluation process is an important starting point for gathering input beyond that of the "Supervisor." Employees are encouraged to complete a Self-Evaluation Form prior to their performance evaluation meeting with their supervisor. The self-evaluation process allows for increased employee involvement in assessing strengths and areas in need of improvement, to identify discrepancies of performance between the employee and supervisor, and to conduct a more constructive evaluation meeting, thus increasing commitment to performance planning. The process is an opportunity for employees to document their accomplishments, performance concerns and professional development activities for the given review period.

Essential Elements of Performance Evaluations

- **Supervisor Evaluation of Employee Performance**

1. **Supervisor reviews the employee's job duties for evaluation (using their job description).** The purpose of this review is to identify the job duties to be evaluated. It is not intended to be a review of the job description for reclassification.
2. **Supervisor and employee discuss the performance evaluation.** The performance evaluation process must include one-on-one discussion between the supervisor and employee with both parties being full participants.
3. **Timeliness.** Staff performance evaluations should cover the calendar year and should be submitted during the first quarter of the following year by April 1.
4. **Documentation.** The Employee Performance Evaluation Form and any required statements/documentation should be sent to the Department of Human Resources. Any additional information that either the supervisor or the employee wants included in the employee's record may be entered into the “Comments” section of the form.

Essential Elements of Performance Evaluations

- **The Performance Evaluation Form**

The Performance Evaluation Form is designed to record the results of the employee's evaluation. During the performance evaluation, use the Performance Evaluation Form to record an overall evaluation in the areas of accomplishments; service and relationships; accountability and dependability; adaptability and flexibility; and decision making/problem solving.

The Performance Evaluation Process

Key Elements of the Performance Evaluation

- **Accomplishments** – Evaluate the employee's success in performing identified duties/areas of responsibilities. Use the job description or departmental goals & objectives to identify specific duties/areas of responsibilities.
- **Service & Relationships** – Evaluate the employee's success in the areas of customer service, communication and interpersonal skills, diversity, student retention and teamwork.
- **Accountability & Dependability** – Evaluate the employee's success in contributing to the effectiveness of the department and the overall mission of the University. NOTE: time off approved under FMLA may not be considered.
- **Adaptability & Flexibility** – Evaluate the employee's success in dealing effectively with additional responsibilities, learning innovative techniques and applying them to his/her job, and participating in appropriate training and development opportunities.
- **Decision Making & Problem Solving** – Evaluate the employee's success in making decisions, following safe work practices, and complying with college policies and federal, state and local laws.

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The Performance Evaluation Process

Ratings

Goals & expectations should be S.M.A.R.T. (specific, measurable, attainable, realistic and timely). An employee should be evaluated based on how well he/she has met the known expectations of his/her position. Each rating is assigned a corresponding numerical rating which should be averaged after completing the rating section.

- **Rarely Achieves Expectations – 1**

Example: Employee rarely completes tasks on time or in a timely manner. (This rating requires written, substantiated documentation).

- **Sometimes Achieves Expectations – 2**

Example: Employee sometimes does / sometimes does not complete tasks on time and may often have to be reminded to complete the tasks.

- **Fully Achieves Expectations – 3**

Example: Employee consistently completes tasks on time or in a timely manner with no intervention.

- **Consistently Exceeds Expectations – 4**

Example: Employee completes tasks early or on time and will consistently seek ways to help others complete tasks and/or accept additional tasks. (This rating requires written, substantiated documentation).

Completing the Evaluation Form

Complete the Evaluation Form by indicating whether the following topics have been addressed during the review:

- Goals and Objectives
- Job Duties and Performance Expectations
- Employee Self-Evaluation Form (Did employee complete?)
- Appropriate Corrective Action, if necessary
- Comments from Supervisor and Employee

Completed Performance Evaluation, Goals & Objectives and Self-Assessment Forms will be kept in employees' record. If the employee disagrees with the evaluation, he/she must consult with their manager/supervisor first, if not resolved at that level the employee should address his/her concerns with the next level of management.

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Other Resources

Questions

Questions about performance evaluations may be forwarded to the Department of Human Resources.

Other instructional information is available to assist with other aspects of the Performance Management process.

- Goals and Objectives (S.M.A.R.T. Goals) (Instructions)
- Self Evaluation Form (Instructions)

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