Guidelines

The Annual Staff Performance Evaluation, which is required for all staff, provides an employee with the opportunity to receive formal feedback on their performance. In addition, a supervisor has the opportunity to discuss how the employee’s knowledge, skills, and abilities have been applied in order to achieve goals and objectives.

Subsequently, this process allows supervisors to translate Loyola’s strategic objectives into school, divisional, or departmental goals for setting performance expectations for each employee. This includes modifying those goals as new factors or priorities emerge, monitoring progress towards accomplishing expectations, and providing regular feedback to an employee regarding their performance relative to the expectations.

Supervisor Instructions:

1. Begin the evaluation process by sending the Annual Staff Performance Evaluation to your employee requesting that they complete a self-assessment with a designated return date. This provides an opportunity for the employee to provide input to their performance and behaviors displayed during the performance review period.
2. After receiving your employee’s self-assessment, complete the supervisor’s rating section. Where appropriate, attach supporting documentation to provide specific examples of goals, activities, and/or behaviors that substantiate your performance feedback or rating. Goals should be reviewed for the past evaluation period and set for the future.
3. Add comments as appropriate considering the various dimensions of performance and suggest means to close performance gaps as needed, or suggest ways for continued professional growth and performance improvement.
4. Distribute a copy of the completed form to the employee and schedule a meeting to discuss the Annual Staff Performance Evaluation.
5. Send a copy of the signed document (supervisor/employee) to your department’s designated HR Business Partner.
6. Supervisors are expected to utilize this instrument and the resulting feedback as a guide toward assessing appropriate merit increases for the employee.

Employee Instructions:

1. Complete a self-assessment of each evaluation category on the Annual Staff Performance Evaluation and return to your supervisor by the date instructed.
2. Provide supplemental attachments to document performance and/or continued professional development as appropriate.
3. Meet with your supervisor to discuss your self-assessment.
4. Add comments as appropriate to support your performance and/or identify professional development opportunities.
5. Sign the Annual Staff Performance Evaluation after the supervisor/employee discussion takes place. Your signature does not necessarily indicate agreement, but that the review has been discussed with you.
6. Keep a copy of the signed document for your own record.

Discussion

During the performance discussion meeting, the employee and supervisor should accomplish a threefold agenda:

a) discuss the employee’s performance ratings as noted by the supervisor, b) make necessary revisions and/or updates based on the performance discussion, and c) set future development and work goals (short and long term), which can be attached to the Annual Staff Performance Evaluation.

Closeout

The supervisor and employee should sign, make copies for departmental and employee records, and forward the original completed form to the department’s designated HR Business Partner. The document will then be scanned into the personnel file and become part of the employment record.
Employee: __________________________ Title: ___________________________ Employee ID: __________

Supervisor: __________________________________ Department: __________________________________

Review Period: ______________________________

Ratings:
1 - **Exceeds Expectations**: surpasses goals and objectives; characterized by significant achievements; overall contributions exceed that of peers.
2 – **Successful/Meets Expectations**: meets goals and objectives; contributions are appropriate relative to peers.
3 – **Improvement Needed**: performance does not meet goals and objectives; contributions fall short as compared to peers.
4 - **N/A**: not applicable to employee

**Job Responsibilities and Goals**

Demonstrates a general and technical knowledge of job responsibilities and produces quality work. Meets established goals. Shares knowledge with peers and makes recommendations for improvements.

Employee Self-Assessment:

_________________________________________________________________________________________________________

_________________________________________________________________________________________________________

_________________________________________________________________________________________________________

**Commitment to Loyola Mission/Vision**

Supports Loyola’s Jesuit Catholic identity, mission, and vision. Incorporates Jesuit principles into work performance, as well as interactions with others. Is welcoming of diversity and inclusion; encourages colleagues to do the same. Treats others with dignity and respect.

Employee Self-Assessment:

_________________________________________________________________________________________________________

_________________________________________________________________________________________________________

_________________________________________________________________________________________________________

**Teamwork**

Functions as a team player and promotes group cooperation and participation. Makes an effort to assist colleagues. Helps create an environment where others can openly share their ideas and suggestions.

Employee Self-Assessment:

_________________________________________________________________________________________________________

_________________________________________________________________________________________________________

_________________________________________________________________________________________________________
Responsiveness to Change
Adapts readily to change by supporting, fostering, and adapting to change in the work environment. Is willing to take on new assignments. Accepts and identifies new and more efficient ways of accomplishing tasks and/or conducting business.

Employee Self-Assessment:
_________________________________________________________________________________________________________
_________________________________________________________________________________________________________
_________________________________________________________________________________________________________

Communication
Has effective oral, written, and listening skills. Regularly communicates with supervisor and colleagues. Seeks and provides feedback. Helps create an environment where information is shared. Listens to the thoughts and concerns of others.

Employee Self-Assessment:
_________________________________________________________________________________________________________
_________________________________________________________________________________________________________
_________________________________________________________________________________________________________

Dependability/Time Management
Is responsible in coming to work on time and does not abuse attendance policy. Approaches work proactively; meets deliverables and deadlines. Plans, organizes, and completes assignments in an acceptable timeframe.

Employee Self-Assessment:
_________________________________________________________________________________________________________
_________________________________________________________________________________________________________
_________________________________________________________________________________________________________

Decision Making/Problem Solving
Makes timely and effective decisions consistent with job responsibilities. Communicates decisions to those individuals who need to know. Uses sound judgment. Able to identify resources and recommend solutions.

Employee Self-Assessment:
_________________________________________________________________________________________________________
_________________________________________________________________________________________________________
_________________________________________________________________________________________________________

Professional Development
Looks for ways to develop the skills and abilities of self and/or others for professional growth. Accepts and/or assigns opportunities to learn new skills and tasks. Seeks additional ways to make value added contributions to the work environment.

Employee Self-Assessment:
_________________________________________________________________________________________________________
_________________________________________________________________________________________________________
_________________________________________________________________________________________________________
Leadership (if applicable)
Provides leadership to others in meeting strategic objectives of University and business unit through teamwork and communication. Develops and mentors employees, resolves performance issues, and incorporates diversity and inclusion focused practices. Builds relationships within and across departments.

Employee Self-Assesment:
________________________________________________________________________________________________________________________________________________________________________

Was this year's required annual compliance training completed?
Harassment Prevention    Yes ___   No ___  HIPPA Training    Yes ___ No ___
Cyber Security Awareness    Yes ___   No ___  Other _______________________
Safety Training (if required)    Yes ___   No ___

Employee Comments
________________________________________________________________________________________________________________________________________________________________________

Supervisor Comments
________________________________________________________________________________________________________________________________________________________________________

Identify documents which are to be attached (e.g., performance goals): ____________________________________________________________

Employee’s Attestation
I have discussed the content of this performance review with my Supervisor. I understand my signature does not necessarily imply agreement.

Employee: ____________________________________________________________  Date: __________________

Supervisor: ____________________________________________________________  Date: __________________

2nd Level Review: ____________________________________________________________  Date: __________________