

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.

This process allows supervisors to translate Loyola's strategic objectives into school, divisional, or departmental goals to set 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 employees 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 he/she completes a self-assessment. This provides an opportunity for the employee to contribute input to his/her performance and behaviors as displayed during the performance review period.
2. Complete the supervisor's rating section of the *Annual Staff Performance Evaluation*. 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 actions needed to close performance gaps or suggest recommendations for continued professional growth and performance improvement.
4. Schedule a meeting to discuss the *Annual Staff Performance Evaluation*. During the meeting, distribute a copy of the supervisor's comments to the employee and be prepared to discuss your ratings and comments, as well as the employee's self-assessment.
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. During meeting, be prepared to discuss your self-assessment, as well as the supervisor's ratings and comments. Add any additional 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 and comments as noted by the supervisor, and also discuss the employee's self-assessment, b) supervisor may make 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

Supervisor
Rating

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:

Supervisor
Rating**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:

Supervisor
Rating

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 the 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-Assessment:

Was this year's required annual compliance training completed?

Harassment Prevention Training: Yes

HIPAA Training: Yes No

Cyber Security Training: Yes No

Other:

Safety Training: 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 that my signature does not necessarily imply agreement.

Employee:

Date:

Supervisor:

Date:

2nd Level Review:

Date: