STAFF PERFORMANCE EVALUATION GUIDE

HAWKS AT WORK

UNIVERSITY OF NORTH DAKOTA

LEADERS IN ACTION

EVALUATION HIGHLIGHTS

According to State Board of Higher Education Policy 604.3, all benefited stuff must have an annual evaluation. Although individual areas may have earlier deadlines, the UND Salary Administration Policy indicates all staff annual evaluations must be completed and submitted to the Office of Human Resources each year **by March 31.**

The evaluation process is a key component of employee development and engagement. The evaluation is designed to provide a fair assessment of an employee's job performance of both outcome and behavior. Evaluations provide time to recognize, engage, encourage, and grow. This is an opportunity for the supervisor and employee to connect regarding performance over the course of the previous calendar year and plan goals for the upcoming year. Annual evaluations document conversations, challenges and accolades provided throughout the year. There should be no surprises to the employee.

Providing each other with honest and valuable feedback provides a sense of belonging and purpose, reduces uncertainty, thereby increasing motivation.

The evaluation process consists of four steps.

Employees who are on an approved leave of absence from the end of the calendar year to the evaluation due date will be required to have a performance evaluation completed upon their return to work.

Staff who had a probationary performance review completed between September and December of the year prior or any staff currently in their probationary period are not required to have an annual evaluation completed.

Each step of the evaluation process is outlined below with detailed responsibilities.

Understanding Performance Ratings

When a Does Not Meet is given, there should be a formal performance improvement plan (PIP) already in place, or one being developed with help from the divisional Human Resources manager to be attached to the evaluation. These plans will include goals detailing what developments will occur to assist the employee in being successful.

Self-Evaluation by Employee

Supervisor Evaluates

Skip Level Supervisor Reviewer

Evaluation Meeting with Employee

If a Meets is given, the supervisor will provide specific details as to why. This means you are meeting the expectations of your position**. This is what you were hired to do.** This could also mean you may have gone above and beyond during this evaluation period and the supervisor will provide commented detail that supports how.

SUPPORTING

HAWKS AT WORK
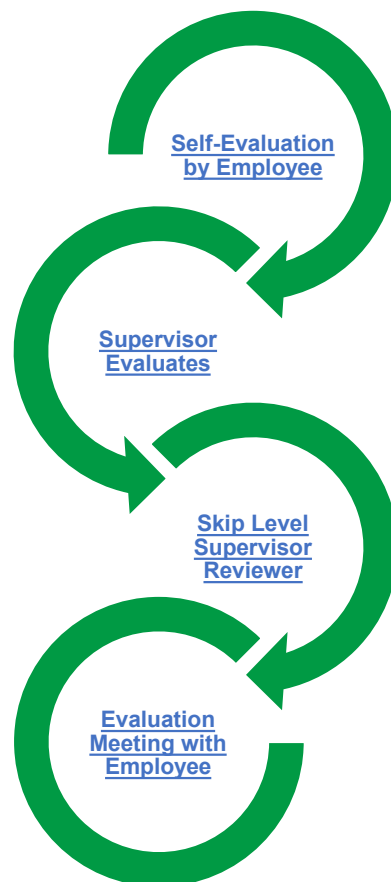
STEP 1: SELF-EVALUATION BY EMPLOYEE

1. The employee (you) receives a copy of their position description alongside their blank evaluation form.
   a. **The position description must be reviewed** prior to the completion of the evaluation tool to ensure accuracy of duties. If updates are made, the revised position description **must** be attached to the final evaluation tool submitted to Human Resources (with changes noted/highlighted).
2. The employee reviews position description.
   a. Does it accurately reflect the duties and responsibilities? If not, please note areas of question or items you feel do not belong and/or additional items that you feel should be included and discuss with your supervisor.
3. Complete the self-evaluation commentary beneath each major duty/responsibility (taken from your position description) in the "Employee Comments" section.
4. Complete the open comment box at the end of your evaluation.
   a. Discuss how you believe your overall performance has gone and provide feedback about the department in general.
   b. Provide comments on what you feel is going great.
   c. List any process improvement items or suggestions.
   d. Include any goals you have for the upcoming year.
   e. Make sure to provide any documents that would support your comments, such as any positive feedback, emails/letters received by a customer or other employee regarding your performance.
5. When making comments, be sure to look at the past year in its entirety.
   a. Instead of a general comment such as the one in the example below, use something like "I consistently go above and beyond to ensure our team operates at an optimal level by staying late, staying positive, and helping others whenever it could contribute to our team goals or deadlines."

Do

Be specific

Include any accomplishments, projects, or extra duties

Describe any areas you went above and beyond.

List areas of concern, or struggles you've experienced you'd like additional focus or training on.

Choose either "Meets" or "Does Not Meet". This section is reserved for your supervisor.

Make vague statements such as "I did a good job." or "The year went great, I met all deadlines."

Don't

6. **Do not sign the evaluation** at this point. Your supervisor will complete their part and set up a time to review with you. After the review, signatures will be collected.
7. Send the completed self-evaluation and reviewed position description back to your supervisor.

STEP 2: SUPERVISOR EVALUATES

1. Once receiving the completed self-evaluation back from employee, the supervisor will make comments and assign a "meets" or "does not meet" in each of their major areas of responsibilities.
   a. If an employee has a major area of responsibility in which they frequently partner with a cross-functional team (i.e. records, finance), the supervisor should solicit feedback from leaders in those respective areas.
2. **Meets/Does Not Meet Expectations Clarification:**
   a. When a Does Not Meet Expectations is given:
      i. You must provide specific examples of why the employee is not meeting expectations.
      ii. There must be a formal performance improvement plan (PIP) already in place, or one must be developed and attached to the evaluation.
         1. This must include goals detailing what development will occur to assist the employee in being successful.
         2. Work with your divisional Human Resources Manager to develop the improvement plan prior to presenting it to your employee.
   b. Giving a Meets Expectations recognizes the employee is for doing what we hire employees to do and recognizes that they are meeting the expectations of their position. This could also mean the employee may have exceeded expectations during this evaluation period and you should provide detail in your comments that supports how. This is a great opportunity to reiterate positive recognition of a job well done as well as a time to share comments on project work, improvement efforts, and tasks completed that were within or went above and beyond their typically assigned duties.
3. Supervisor provides a copy to the skip level reviewer.

STEP 3: SKIP LEVEL SUPERVISOR REVIEWER

1. The employee's supervisor reviews the employee evaluation with their leader (the skip level supervisor), prior to the document being presented to the employee.
2. Skip level should review for balance and appropriateness within their respective unit.
3. Skip level may want to add comments for the employee such as thank you, project comments, etc.
4. Skip level signs as the "reviewer" and returns to supervisor.

STEP 4: EVALUATION MEETING WITH EMPLOYEE

1. Supervisor will schedule a time to meet with employee face-to-face, or, for individuals who work 100% remote, use Zoom or Teams
   a. Set aside ample time to thoroughly review and to avoid feeling rushed. The meeting should take place in a location free from interruptions.
2. Send a completed copy **ahead of time** for the employee to review.
3. Employee and supervisor meet and discuss the past year and develop goals for the next year. Time should be provided for the employee to provide feedback on their position, comments, concerns and questions about their role, the department, the supervisor and division.
4. Finalize the evaluation document to include the developed goals and all feedback.
5. Supervisor and employee sign evaluation. **T**he employee has the right to attach any supporting document to the evaluation they choose.
6. Supervisor sends signed evaluation to Human Resources via UND.AnnualEvaluations@UND.edu.

QUESTIONS? CONTACT YOUR DIVISIONAL HR MANAGER

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