

Department of
Human Resources



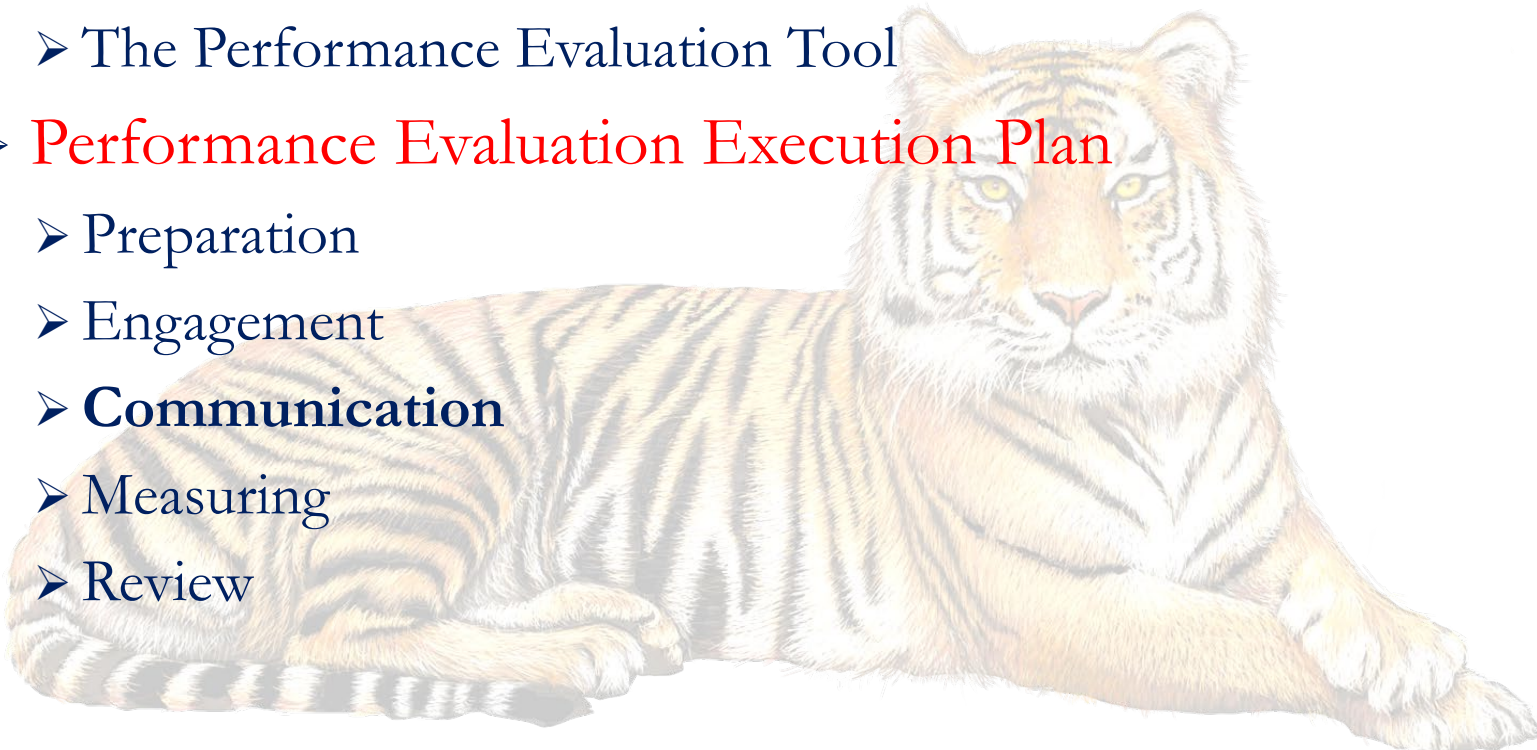
Staff Development
Center

Effectively Administering the Performance Evaluation Process



PE Session Agenda

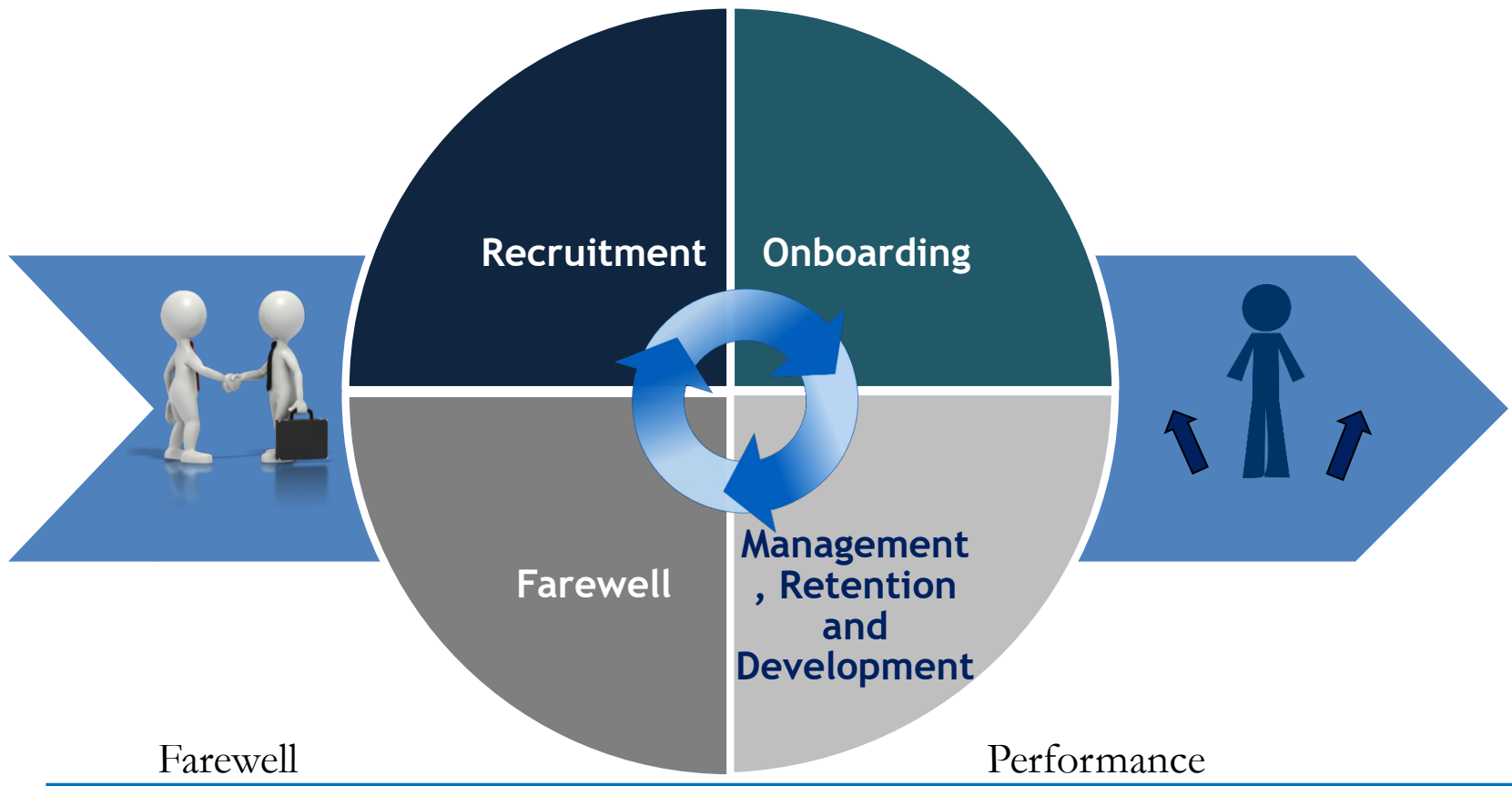
- **Performance Evaluation Process Overview**
 - Define Performance Evaluation / Management
 - Roles & Responsibilities
 - The Evaluation Period
 - The Performance Evaluation Tool
- **Performance Evaluation Execution Plan**
 - Preparation
 - Engagement
 - **Communication**
 - Measuring
 - Review



The Employment Lifecycle

Recruitment

Onboarding



Farewell

Performance

HR plays a role in every step of the employees Career

Performance Evaluation/Management

Performance Evaluation

- Ongoing process of communication between a supervisor and employee about performance expectations that occurs throughout the year.

Performance Management

- Supports the accomplishment of the strategic objectives of Jackson State University; The work system as a whole.

The Performance **EVALUATION**

- The evaluation should be a review of the past year's performance. (July 1 – June 30)
- The annual evaluation should not be the first time the employee learns of your concerns.
 - July 1, Goal Setting
 - January 1-15, Mid Term Feedback
 - June 1-July 30, Annual PE
- Through previous counseling and other communications, the employee should be aware of any concerns you might have about their job performance.



The process **includes**:

- Setting objectives
 - Be S.M.A.R.T.
 - Specific
 - Measurable
 - Achievable
 - Realistic
 - Timely
- Identifying goals
 - Immediate
 - Intermediate
 - Long-term
- Providing feedback
- Evaluating results

Performance Evaluation

Roles & Responsibilities

Department of Human Resources:

- has the **overall responsibility for the administration** of the Performance Evaluation Process.

Vice Presidents, Deans, Directors or Department Heads:

- **ensures** that a performance evaluation and the **establishment of goals and objectives are accomplished by July 30**, for each staff employee within his or her area of responsibility.

Immediate Supervisor:

- **is the employee's "evaluator"** and **is responsible for observing and evaluating the employee's** job performance and completing the performance evaluation form.

Reviewing Official:

- **is the "Evaluator's" supervisor** and is **responsible for reviewing the evaluation for accuracy and objectivity.**



Performance Evaluation Period

- The evaluation period is **July 1, 2018 through June 30, 2019.**
- **All employees employed for at least six (6) months** between July 1, 2018 and June 30, 2019, should receive an annual performance evaluation.
- **Employees who have not completed their probationary period** as of June 30, should be given the appropriate appraisal upon completion of the six (6) months introductory period.
- **However, you should conduct a goal planning session with ALL employees** under your supervision to determine goals and objectives for the coming year.

Performance Evaluation **TOOL**

- For **consistency**, it is important that **every department use** the Jackson State Performance Evaluation Process through JSU P.A.W.S.
- **Instructions** for the Performance Evaluation process is to be **located on the HR website**.



Performance Evaluation Execution Plan



Prepare
Engage
Communicate
Measure
Review



Pre-Evaluation Preparation



- **Set a calendar date in advance** that is **convenient for both** you and the employee.

- **You may ask** the employee to prepare **a self-evaluation and submit to you (supervisor) before** the scheduled evaluation date.

- **Gather:**
 - Job descriptions
 - Last year's performance evaluation, including goals
 - Work rules and processes
 - Your documentation/notes
 - Any feedback or letters from customers/co-workers
 - Current disciplinary memos

The Evaluation Form **should be:**

- ✓ **Detailed**, using **specific examples**
- ✓ **Job-related**
- ✓ **Goal-oriented** and **based on performance and behavior**
- ✓ **Free of personal likes, dislikes, and stereotypes**
- ✓ Not **overly** strict or lenient
- ✓ **Not overly weighted** by **a single or recent** incident

Be honest, fair, and consistent

- Be certain that you have reviewed **all of your** employees in an objective and consistent manner.
- **Don't** say the employee is improving if he/she is not performing well.
- The performance evaluation **should be a realistic snapshot** of the employee's **performance**.
- Don't create a situation **where it appears** that you are providing excuses for one employee while holding another employee accountable.

When in
DOUBT
tell the
TRUTH

Rate the employee's performance, not the employee's attitude



- Keep your comments **job-related** and based on the employee's **ability to perform** his/her job.
- **Avoid phrases** like “*bad attitude*”; “*he’s not a team player*”, and other subjective type comments.
- **Explain the behavior** that is a result of the attitude.
- **Don’t inflate ratings.** Inflation of ratings only inflates an employee’s expectations.

Meet with the Reviewer

- **Once the evaluation has been saved** by the supervisor, the reviewer will have access to the evaluation in her/his P.A.W.S.
- **Meet with the reviewer** for suggestions and opinions.
- Supervisors will be able to **edit** the evaluation, **if necessary**.
- Finalize the evaluation and click “**evaluation ready to be reviewed by employee.**”
- Give employee **OK** to review file in P.A.W.S.

Prepare for the Performance Evaluation Meeting



Before conducting the evaluation take a moment to...

- **List** the **employee's main areas of responsibility.**
- **Identify** what the employee has **done well.**
- **Identify** areas in which the employee **needs to improve.**
- **Identify** **what you can do to help** the employee do a better a job.
- **Review** self-evaluation, if applicable.

Conducting the Employee Evaluation

1. **Welcome the employee** and **put them at ease**. Keep the discussion open for input.
2. **Discuss** evaluation with employee **emphasizing strengths** as well as areas that need improvement.
3. **Set goals, expectations, and standards together** for the next evaluation.
4. **Be honest** and **be prepared** to discuss questionable items.
5. Discuss **training and development** plans with the employee.
6. **Summarize the session** and end on a **POSITIVE** note.





FOLLOW UP



- Don't just criticize a deficient performer; set goals for follow up and improvement or development.
- Work together to create a plan of action to help the employee in deficient areas and to establish goals for the coming year.
- Set a follow up period and be sure to re-evaluate the employee at the appropriate time.



Responding to Employee Reactions



The employee who wants too much

- Explain that promotions reward performance over time, perhaps years.
- Make no promises to the employee.
- Don't let the employee leave with unrealistic expectations.
- Provide a realistic picture of future prospects.

The employee who becomes defensive or makes excuses

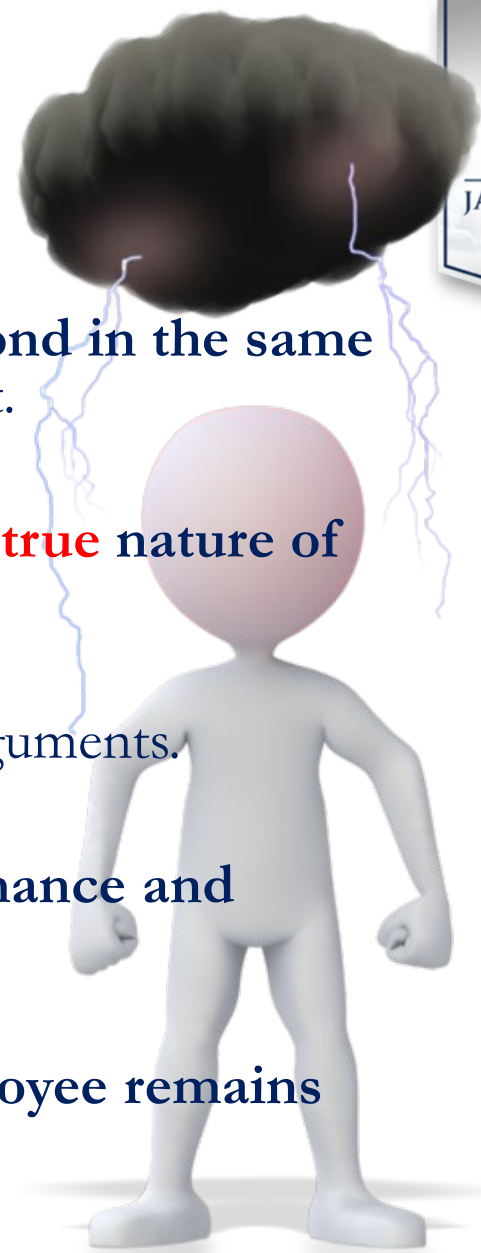
- Listen to what the employee has to say and paraphrase back. Remain neutral.
- Ask for specifics with open-ended questions.
- Try to determine the cause: *“Tell me more.” “How did you reach that conclusion?”*

- Ask how the employee will resolve the problem.



The **Angry** Employee

- Let him/her blow off steam but **don't respond in the same manner**. **Stay calm** and maintain eye contact.
- **Listen** and ask open-ended questions to find **true** nature of resistance.
- **State your point-of-view calmly**. **Avoid** arguments.
- Bring discussion and **focus back to performance and standards**.
- Don't try to reach an agreement **if** the employee remains angry.
- Schedule a **second** meeting.



The Unresponsive Employee

- Be patient and cordial.
- Show concern.
- Stay silent and wait for the employee to say something.
- Ask open-ended questions.



LET'S TALK ABOUT IT!

The Performance Evaluation **REVIEW**



- **Communicates** organization & departments **goals**.
- **Builds** stronger working relationships.
- **Improves productivity.**
- **Provides understanding** of HR **policies and processes** relative to compensation, performance, and career advancement.
- **Identifies** poor or marginal performers.
- **Improves rapport and builds morale.**
- **Identifies** the employee's general **training needs**.
- **Recognizes employee accomplishments.**
- **Helps** employee **set goals** and improve performance.
- **Allows employee to discuss career goals** and ask about **opportunities** for career development.

Performance Evaluation



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