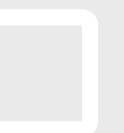


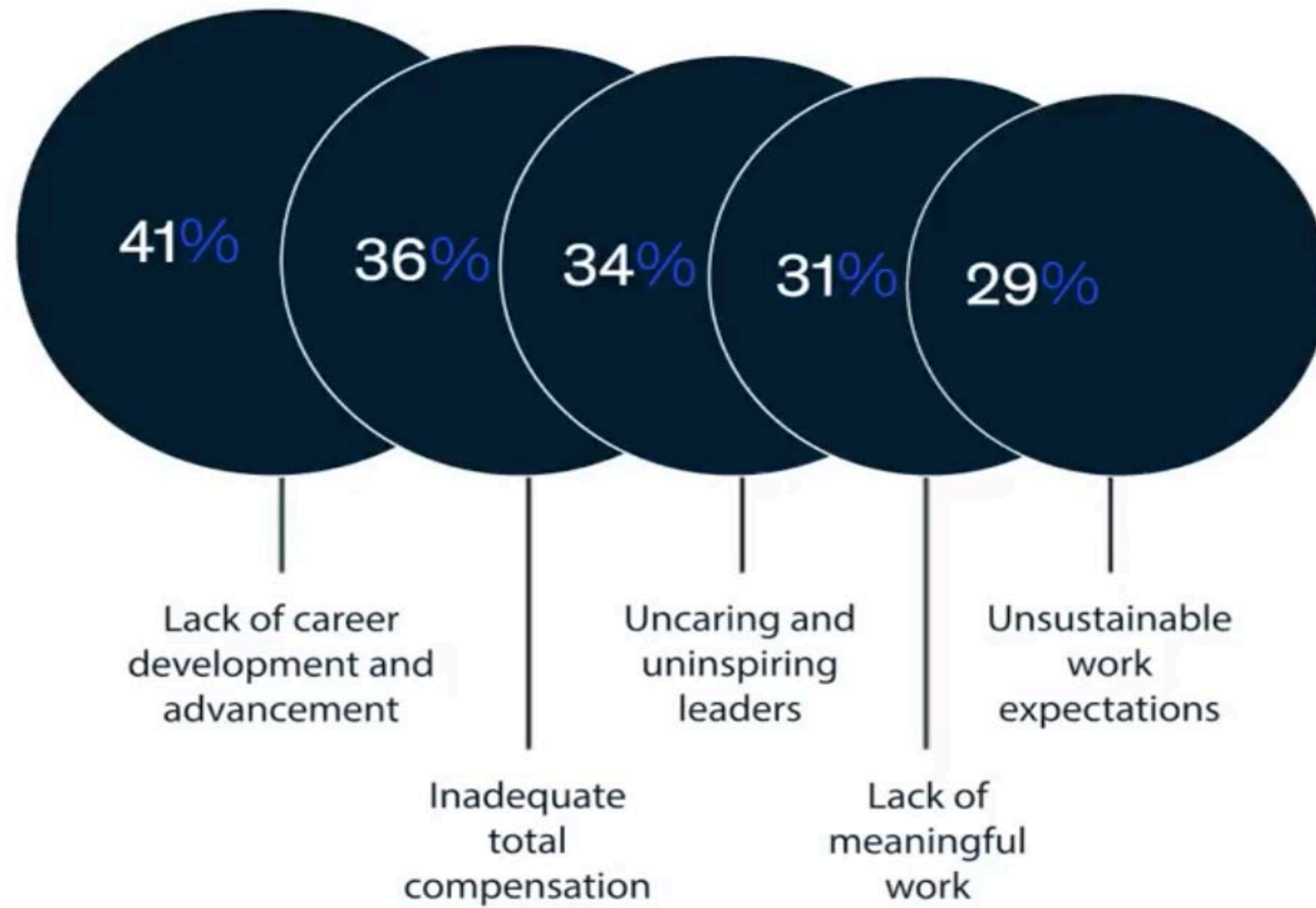
Performance Review Process

2022

DIVISION OF STUDENT AFFAIRS



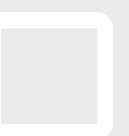
The top 5 reasons employees quit

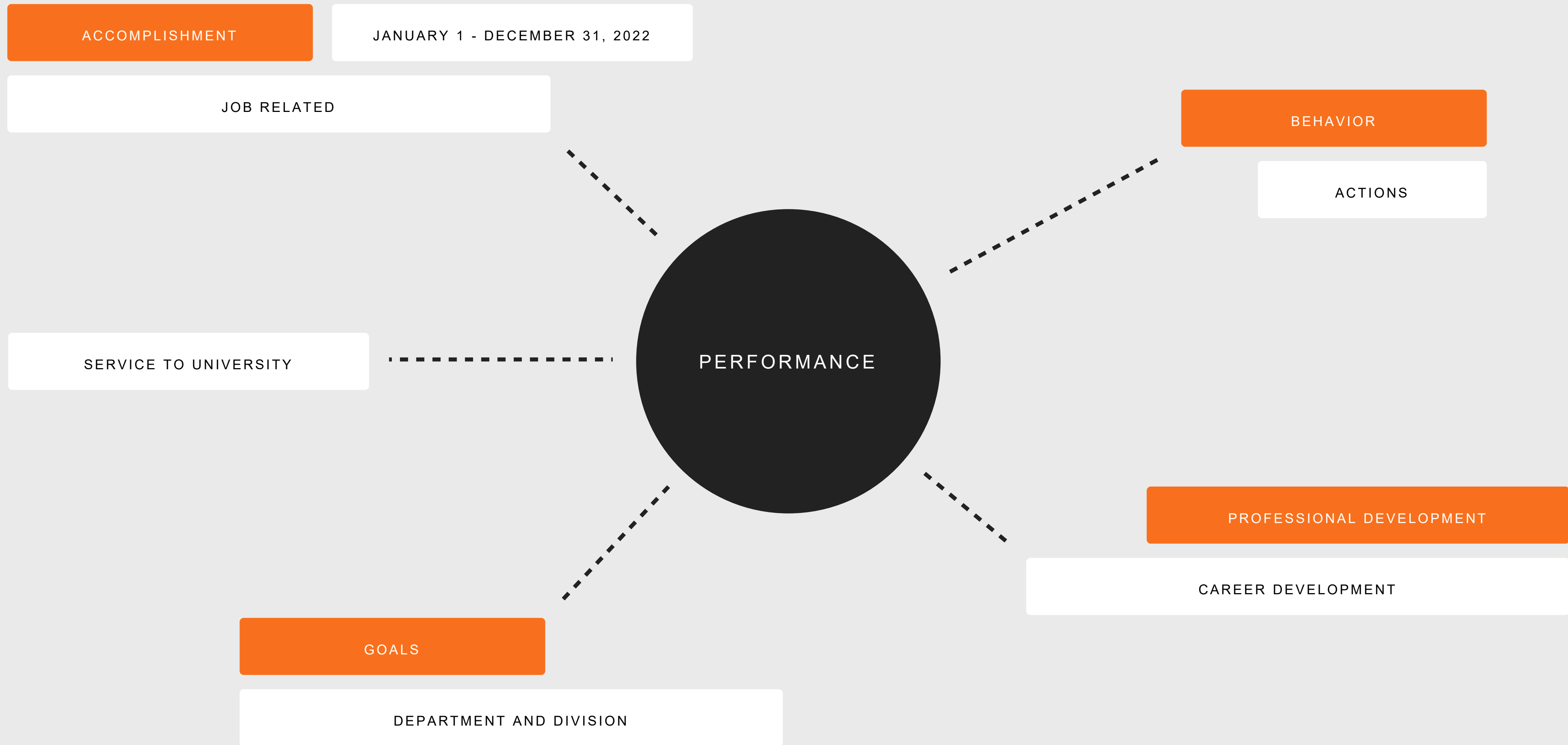


McKinsey & Company

Source: McKinsey's 2022 Great Attrition, Great Expectation 2022 Global survey

0:08



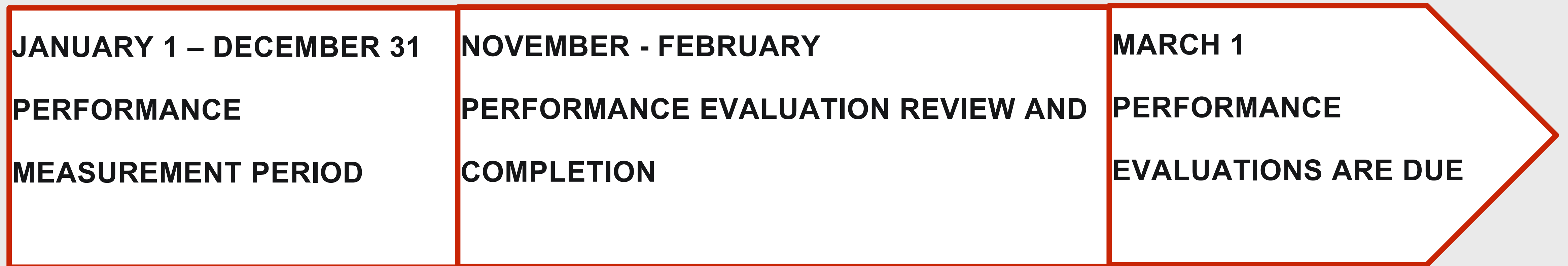


Performance Evaluation Timeline

2021



OVERALL TIMELINE



Measurement period from January 1, 2022 – December 31, 2022

Staff completes self assessment (optional)

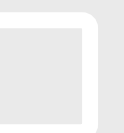
Supervisor prepares performance review

Supervisors send evaluation to second line supervisor for review and signature

Supervisor conducts evaluation meeting with staff member

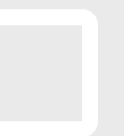
Supervisor provide signed copy to staff and VPSA; retains copy for file

Performance Reviews due to VPSA (Tim) By March 1





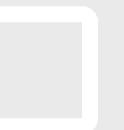
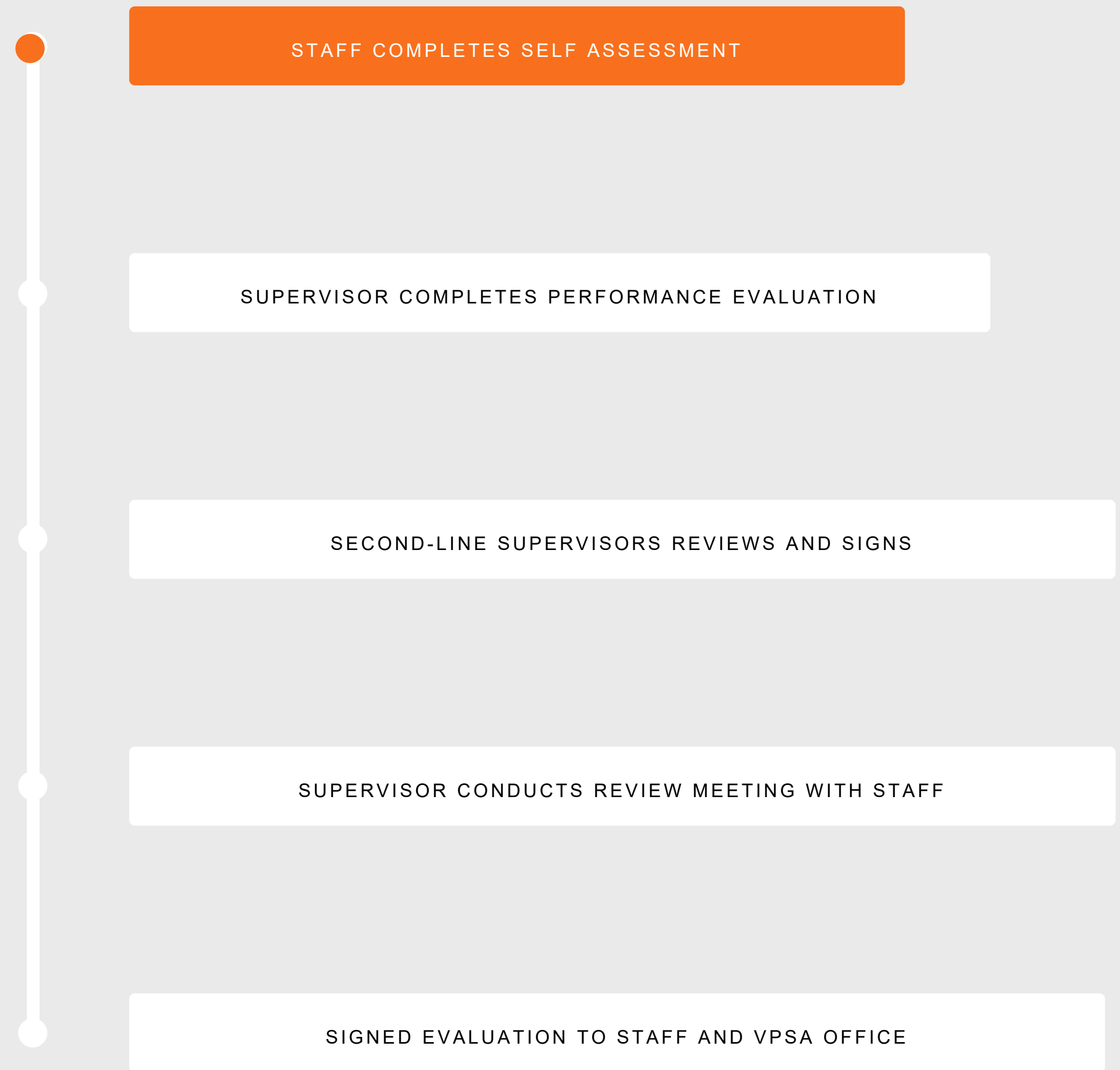
What makes
a
performance
review
effective and
helpful?



Process

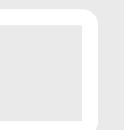
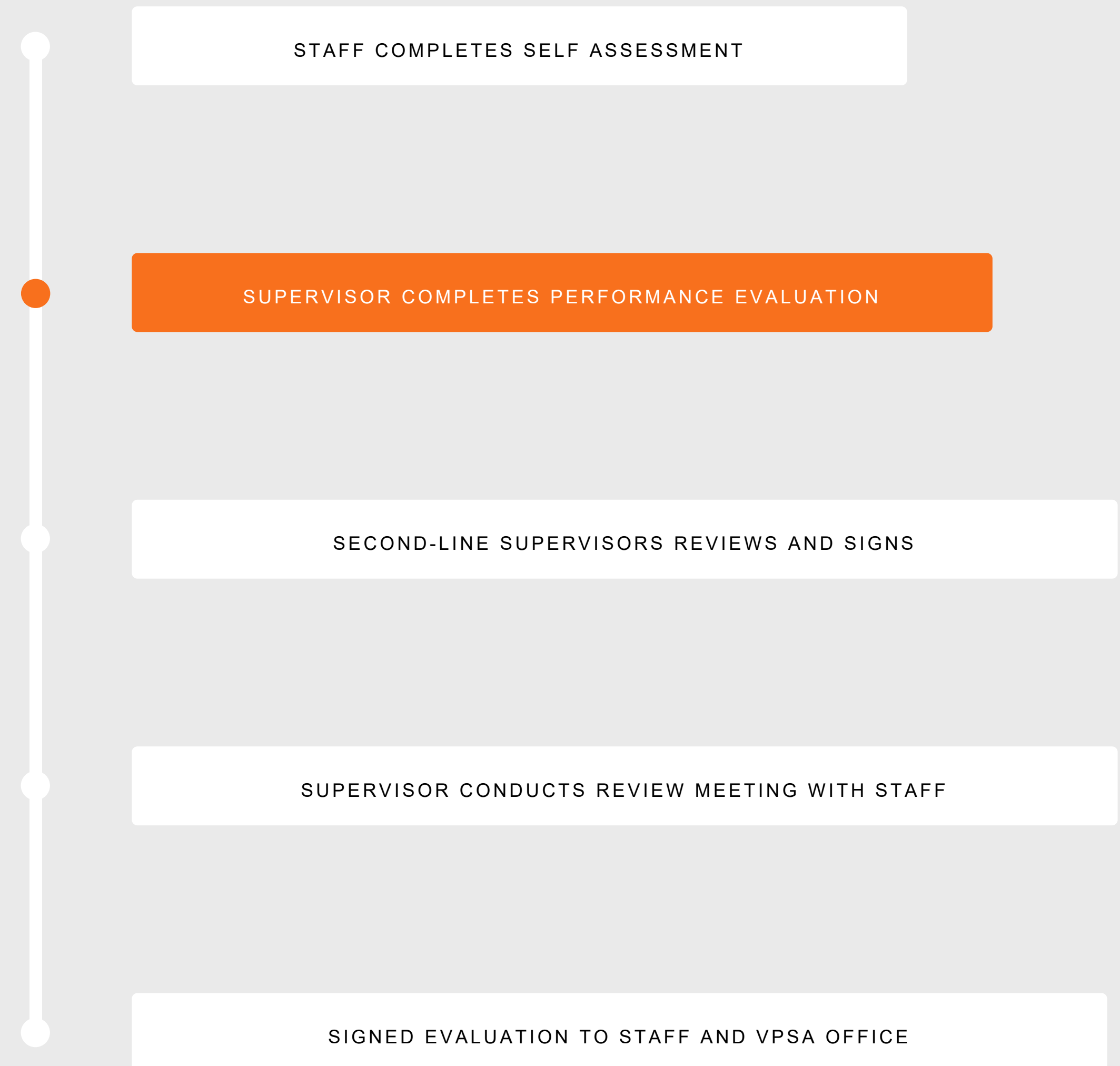
Give staff member time for the self assessment

Review the self-assessment to complete your review



Process

From January 1, 2022–
December 31, 2022



Process

Consult with Second Line Supervisor for deadline – Second Line signs off before meeting with staff member



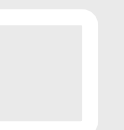
STAFF COMPLETES SELF ASSESSMENT

SUPERVISOR COMPLETES PERFORMANCE EVALUATION

SECOND-LINE SUPERVISORS REVIEWS AND SIGNS

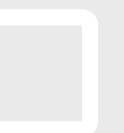
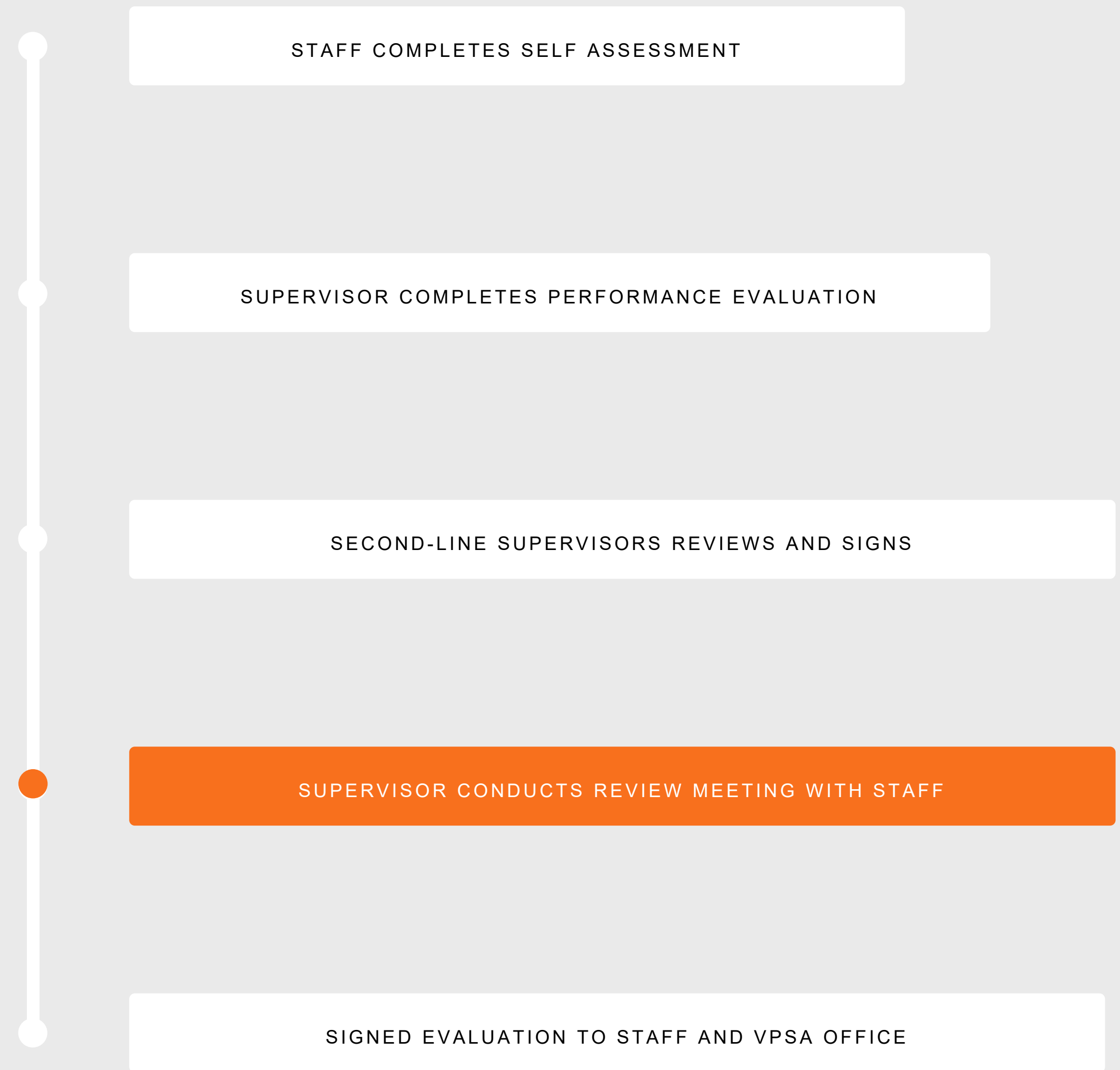
SUPERVISOR CONDUCTS REVIEW MEETING WITH STAFF

SIGNED EVALUATION TO STAFF AND VPSA OFFICE



Process

Face to face meeting



Process

Signed by Supervisor and Staff member (Second Line Supervisor should have signed before the meeting)

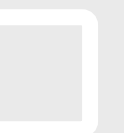
STAFF COMPLETES SELF ASSESSMENT

SUPERVISOR COMPLETES PERFORMANCE EVALUATION

SECOND-LINE SUPERVISORS REVIEWS AND SIGNS

SUPERVISOR CONDUCTS REVIEW MEETING WITH STAFF

SIGNED EVALUATION TO STAFF AND VPSA OFFICE



Please complete and return to your supervisor prior to your performance evaluation meeting. Although this form is *optional*, employees are encouraged to complete this self-assessment to provide their supervisor with valuable information.

Section 1: Employee Information

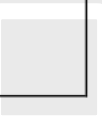
Employee Name (Last, First)	Employee ID#
Manager/Supervisor Name & Title	
Performance Period	Date Completed

Section 2: Self-Assessment

What were your major achievements in the measurement period? (Ex. Created a new process, spearheaded a training course, participated in a community service project, etc.)
Who are your primary customers and how well have you served them this measurement period?
What are the areas of your performance (professional conduct and results) on which you could improve? Please describe.
Are there additional skills, knowledge, or resources that would help you more effectively perform your present job or enhance your skill opportunities? If yes, please list.
What goals (specific measurable results) do you expect to accomplish during the next measurement period?
Did you meet your development plan goals for the measurement period? (Please see prior measurement period's evaluation)
List the subjects you would like to discuss during your annual performance evaluation meeting.

Staff Self Assessment

- What were your achievements in the measurement period?
- What are the areas of your performance (professional conduct and results) on which you could improve? Please describe.
- Are there additional skills, knowledge, or resources that would help you more effectively perform your present job or enhance your skill opportunities? If yes, please list.
- What goals (specific measurable results) do you expect to accomplish during the next measurement period?



Performance Review

2021



REVIEW FORM



Performance Evaluation

Employee Name (Last, First)		Employee ID#	
Job/Classification/Title		Department	
Manager/Supervisor Name & Title		Review Period (From, To)	
Review Date	Review Type		
	<input type="checkbox"/> New Hire	<input type="checkbox"/> Annual	<input type="checkbox"/> Provisional <input type="checkbox"/> Other:

Purpose

The purpose of the Performance Evaluation is to reflect on the employee's job performance and conduct for the review period and to set goals for the upcoming year. This tool is to be used for interactive and continuous communication between supervisors and employees throughout the year.

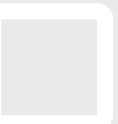
Instructions

Please complete each section of the form below. For additional information, please see the [Instructions](#) online.

Section 1: Evaluation of Measurement Period	Section 2: Plan for Measurement Period
Section 1A: Job Responsibilities Section 1B: Individual Goals Section 1C: Professional Conduct Section 1D: Manager's Overall Evaluation	Section 2A: Goals for Next Measurement Period Section 2B: Development Plan

Evaluation Levels and Sample Criteria

Exceeding (E)	Succeeding (S)	Developing (D)	Needs Improvement (NI)
Includes individuals who significantly and consistently exceed expectations and role requirements	Includes individuals who consistently meet and occasionally exceed expectations and role requirements	Includes new employees who are still learning specific skills or key job responsibilities. Not a reflection on the employee's skills, but simply a product of time in the position	Demonstrates inconsistent required role knowledge and does not fully perform all requirements and duties
Exceeds goals set for the year	Meets goals set for the year	Needs to gain proficiency in certain skills, knowledge, processes, speed, and/or job standards due to new process	Meets the minimal standards for quantity or quality; often misses deadlines, work is regularly incomplete
Demonstrates exceptional depth and breadth of role knowledge	Possesses sufficient depth and breadth of role knowledge	Makes a visible effort to improve. Requires support/direction, however, performance demonstrates the ability to meet expectations	Takes little to no initiative, even with prompting
Demonstrates exemplary conduct for other supervisors/staff members to emulate; highly regarded by others within the University community	Exhibits professional interactions with peers, customers, managers, and/or students	Makes a conscious effort to demonstrate professional interactions with peers, customers, managers, and/or students	Requires more than the expected level of supervision due to lower quality work required to complete role successfully
Exceeds customer's	Provides accurate and timely assistance to peers, customers, managers, and/or students on a consistent	Demonstrates a willingness to learn from mistakes in order to adapt	Demonstrates inconsistent and/or unprofessional interactions with peers, customers, managers, and/



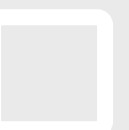
Performance Review

2021



SECTIONS 1 & 2

Section 1: Evaluation of Measurement Period	Section 2: Plan for Measurement Period
Section 1A: Job Responsibilities Section 1B: Individual Goals Section 1C: Professional Conduct Section 1D: Manager's Overall Evaluation	Section 2A: Goals for Next Measurement Period Section 2B: Development Plan



Level Of Performance

Exceeding

- Significantly and consistently exceeds expectations and role requirements - provide specific examples over the entire 12 month period
- Exceeds goals set for the year (see 2021 review)
- Demonstrates exceptional depth and breadth of role knowledge
- Demonstrates exemplary conduct for other supervisors/staff members to emulate; highly regarded by others within the University community
- Exceeds customer's expectations on a consistent basis

Employee Name (Last, First)		Employee ID#	
Job/Classification/Title		Department	
Manager/Supervisor Name & Title		Review Period (From, To)	
Review Date	Review Type		
	<input type="checkbox"/> New Hire	<input type="checkbox"/> Annual	<input type="checkbox"/> Provisional <input type="checkbox"/> Other:

Purpose


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Evaluation Levels and Sample Criteria

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Exceeds customer's expectations on a consistent basis	Provides accurate and timely assistance to peers, customers, managers, and/or students on a consistent basis	Demonstrates a willingness to learn from mistakes in order to adapt conduct effectively	Demonstrates inconsistent and/or unprofessional interactions with peers, customers, managers, and/or students

Level of Performance

Succeeding

- Individuals who consistently meet and occasionally exceed expectations and role requirements
- Meets goals set for the year (see 2021 review)
- Possesses sufficient depth and breadth of role knowledge
- Exhibits professional interactions with peers, customers, managers, and/or students
- Provides accurate and timely assistance to peers, customers, managers, and/or students on a consistent basis

Employee Name (Last, First)		Employee ID#	
Job/Classification/Title		Department	
Manager/Supervisor Name & Title		Review Period (From, To)	
Review Date	Review Type		
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Level of Performance

Needs Improvement

- Demonstrates inconsistent required role knowledge and does not perform all requirements and duties – provide specific examples over the past 12 months
- Meets the minimal standards for quantity or quality; often misses deadlines, work is regularly incomplete
- Takes little to no initiative, even with prompting
- Requires more than the expected level of supervision due to lower quality work required to complete the role successfully
- Demonstrates inconsistent and/or unprofessional interactions with peers, customers, managers, and/or students
- Notify VPSA office if a staff member will be receiving overall “needs improvement”

Employee Name (Last, First)		Employee ID#	
Job/Classification/Title		Department	
Manager/Supervisor Name & Title		Review Period (From, To)	
Review Date	Review Type		
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Purpose

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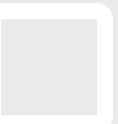
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Level of Performance

Developing

- For **new employees (6 months)** who are still learning specific skills or key job responsibilities; not a reflection on the employee's skills but simply a product of time in the position
- Needs to gain proficiency in certain skills, knowledge, processes, speed, and/or job standards due to a new process
- Makes a visible effort to improve. Requires direction, however, performance demonstrates the ability to meet expectations
- Makes intentional effort to demonstrate professional interactions with peers, customers, managers and/or students
- Demonstrates a willingness to learn from mistakes in order to adapt conduct effectively
- Developing is not less than Succeeding

Employee Name (Last, First)		Employee ID#	
Job/Classification/Title		Department	
Manager/Supervisor Name & Title		Review Period (From, To)	
Review Date	Review Type		
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Performance Review

2022



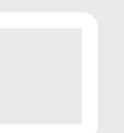
SECTION 1A

Job Responsibilities

Responsibilities derive from what is included in the job description and other duties as assigned

- The evaluation is based on the extent to which the employee performed the regular duties of the job
- The supervisor may provide a copy of the employee's job description at the time of the performance evaluation meeting

Section 1A: Evaluation of Job Responsibilities			
<input type="checkbox"/> Exceeding (E)	<input type="checkbox"/> Succeeding (S)	<input type="checkbox"/> Developing (D)	<input type="checkbox"/> Needs Improvement (NI)
<i>Add comments regarding overall job performance of all job factors for measurement period.</i>			



Performance Review

2022



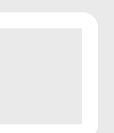
SECTION 1B

Individual Goals

Individual goals should be based on, and linked to, the needs and direction of the department

- Goals are established and agreed upon by the supervisor and employee at the beginning of the measurement period and should be expressed as measurable actions and results
- The evaluation is based on the level of achievement of the employee's individual goals
- Goals established for 2022 from the 2021 review should be used

Section 1B: Evaluation of Individual Goals			
<input type="checkbox"/> Exceeding (E)	<input type="checkbox"/> Succeeding (S)	<input type="checkbox"/> Developing (D)	<input type="checkbox"/> Needs Improvement (NI)
Add comments regarding achievement of individual goals for measurement period (measurable actions & results).			



Performance Review

2022



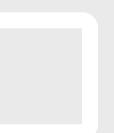
SECTION 1C

Professional Conduct

Professional conduct is measured based on “how” employees performed their responsibilities, achieved goals and interacted with their peers, customers, management, and/or students. Please refer to the University’s Code of Conduct. Assess the following:

- The ability to understand the needs of University of Louisville customers in order to provide accurate and timely service
- The ability to work cooperatively with others to achieve organizational and team goals
- The ability to create new and valuable ideas and use these ideas to solve problems and develop improved processes and methods
- The ability to show commitment to continuous learning and improvement of self, others and University policies and procedures
- The ability to take full advantage of the rich backgrounds and talents of all by recognizing and valuing differences, seeking inclusiveness, and considering and respecting different points of view

Section 1C: Evaluation of Professional Conduct			
<input type="checkbox"/> Exceeding (E)	<input type="checkbox"/> Succeeding (S)	<input type="checkbox"/> Developing (D)	<input type="checkbox"/> Needs Improvement (NI)
Add comments regarding demonstrated conduct during the measurement period.			



Performance Review

2022



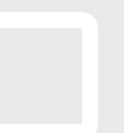
SECTION 1C

Professional Code of Conduct

<https://louisville.edu/compliance/ico/code>

Behavior and Observed actions

Section 1C: Evaluation of Professional Conduct			
<input type="checkbox"/> Exceeding (E)	<input type="checkbox"/> Succeeding (S)	<input type="checkbox"/> Developing (D)	<input type="checkbox"/> Needs Improvement (NI)
<i>Add comments regarding demonstrated conduct during the measurement period.</i>			



Performance Review

2022



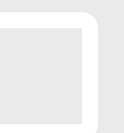
SECTION 1C

Professional Conduct

Supervisors should also exhibit:

- The ability to develop a common vision by providing clear direction and priorities, clarifying roles and responsibilities, and promoting mutual understanding through effective communication
- The ability to take the time to effectively plan and evaluate performance, provide feedback, recognition and coaching, and develop employees to be their personal best at the University of Louisville

Section 1C: Evaluation of Professional Conduct			
<input type="checkbox"/> Exceeding (E)	<input type="checkbox"/> Succeeding (S)	<input type="checkbox"/> Developing (D)	<input type="checkbox"/> Needs Improvement (NI)
Add comments regarding demonstrated conduct during the measurement period.			



Performance Review

2022



SECTION 1D

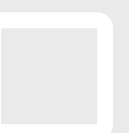
Overall Evaluation

Provide an overall evaluation of how an employee performed based on the results of their role responsibilities, individual goals, and professional conduct. The overall evaluation should be:

- Supported by the appropriate documentation or comments – specific examples over the past 12 months
- Reviewed with the employee after approval of the second line supervisor

A performance improvement plan must be implemented if overall “Needs Improvement” is received – contact VPSA

Section 1D: Manager's Overall Evaluation			
<input type="checkbox"/> Exceeding (E)	<input type="checkbox"/> Succeeding (S)	<input type="checkbox"/> Developing (D)	<input type="checkbox"/> Needs Improvement (NI)
<i>Summarize the employee's performance, discussing areas of strength & areas for improvement. Provide Overall Evaluation Rating for measurement period.</i>			



Performance Review

2022



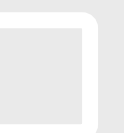
SECTION 2A

Goals for Measurement Period

This section lists the category of goals/outcomes/standards for the individual and a description of the goal and measures/targets. Together, the employee and supervisor will discuss and determine the employee's goals for the next measurement period January 1, 2023 – December 31, 2023. The number of goals should be based on the employee's individual needs.

- Goals are set in order to enhance the performance of the employee's job factors and responsibilities for the entire next year
- Goals are clear, specific and measurable
- Goals must be attainable but should "stretch" the employee
- Not limited for number of goals

Section 2A: Goals for Next Measurement Period	
Goal	Description and Measures



Performance Review

2022



SECTION 2B

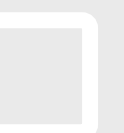
Development Plan

Identifies areas of growth for the employee and is intended to increase and/or improve employee's work-related knowledge, skill set, or professional conduct through training opportunities and/or professional development activities.

The development plan:

- Describes the development need and how the individual will develop (i.e. through training, special assignment, coaching, practice, etc.)
- May either be on an as needed basis or a requirement for the employee
- Consider the professional aspirations of the staff member

Section 2B: Development Plan	
Goal	Description and Measures



Performance Review

2022



REVIEW FORM

UNIVERSITY OF LOUISVILLE

Performance Evaluation

Employee Name (Last, First)		Employee ID#	
Job/Classification/Title		Department	
Manager/Supervisor Name & Title		Review Period (From, To)	
Review Date	Review Type		
	<input type="checkbox"/> New Hire	<input type="checkbox"/> Annual	<input checked="" type="checkbox"/> Provisional
	<input type="checkbox"/> Other:		

Purpose

The purpose of the Performance Evaluation is to reflect on the employee's job performance and conduct for the review period and to set goals for the upcoming year. This tool is to be used for interactive and continuous communication between supervisors and employees throughout the year.

Instructions

Please complete each section of the form below. For additional information, please see the [Instructions](#) online.

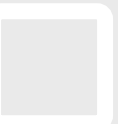
Section 1: Evaluation of Measurement Period	Section 2: Plan for Measurement Period
Section 1A: Job Responsibilities Section 1B: Individual Goals Section 1C: Professional Conduct Section 1D: Manager's Overall Evaluation	Section 2A: Goals for Next Measurement Period Section 2B: Development Plan

Evaluation Levels and Sample Criteria

Exceeding (E)	Succeeding (S)	Developing (D)	Needs Improvement (NI)
Includes individuals who significantly and consistently exceed expectations and role requirements	Includes individuals who consistently meet and occasionally exceed expectations and role requirements	Includes new employees who are still learning specific skills or key job responsibilities. Not a reflection on the employee's skills, but simply a product of time in the position	Demonstrates inconsistent required role knowledge and does not fully perform all requirements and duties
Exceeds goals set for the year	Meets goals set for the year	Needs to gain proficiency in certain skills, knowledge, processes, speed, and/or job standards due to new process	Meets the minimal standards for quantity or quality; often misses deadlines, work is regularly incomplete
Demonstrates exceptional depth and breadth of role knowledge	Possesses sufficient depth and breadth of role knowledge	Makes a visible effort to improve. Requires support/direction, however, performance demonstrates the ability to meet expectations	Takes little to no initiative, even with prompting
Demonstrates exemplary conduct for other supervisors/staff members to emulate; highly regarded by others within the University community	Exhibits professional interactions with peers, customers, managers, and/or students	Makes a conscious effort to demonstrate professional interactions with peers, customers, managers, and/or students	Requires more than the expected level of supervision due to lower quality work required to complete role successfully
Exceeds customer's	Provides accurate and timely assistance to peers, customers, managers, and/or students on a consistent	Demonstrates a willingness to learn from mistakes in order to adapt	Demonstrates inconsistent and/or unprofessional interactions with peers, customers, managers, and/

Provisional Review

- New employees (6 months)
- Needs to gain proficiency in certain skills, knowledge, processes, speed, and/or job standards due to a new process
- Developing is not less than Succeeding; Exceeding would not be given at this time



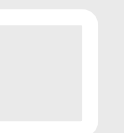
Performance Review

2022



FINAL

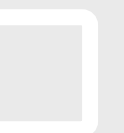
- **Allow time for questions and reflection**
- **2nd Supervisors signature, Staff members signature, your signature**
- **Attach staff self assessment (and any document that the staff member provides)**
- **Copy to staff member and copy for your file**
- **Send electronic (scanned signed copy) and hard copy to VPSA (Dave)**



HR Policies



- **HR Policies** <http://louisville.edu/hr/policies>
- **Policy Website** <https://louisville.edu/policies>
- **Red Book** <https://louisville.edu/provost/redbook/>
- **Code of Conduct** <https://louisville.edu/compliance/ico/files/code-of-conduct>
- **Compliance** <https://louisville.edu/compliance/>
- **SA Manual** <https://louisville.edu/studentaffairs/staff/staffresources>



Questions

[HTTPS://LOUISVILLE.EDU/STUDENTAFFAIRS/STAFF/STAFFRESOURCES](https://LOUISVILLE.EDU/STUDENTAFFAIRS/STAFF/STAFFRESOURCES)

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