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

Management, Retention and Development

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.

- 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.
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 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.

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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.
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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