2015 Performance Review

Division of Real Estate
Human Resources
What we will cover

• What is the process?
• How do I prepare?
• What is the timeline?
• Which form do I use?
• Resources
What is the process?

1. Feedback and Perspectives Review
2. Self- Review
3. Annual Performance Review form and Individual Performance meetings
What is the process?

- Review period is July 1, 2014 to June 30, 2015
- All career employees receive a Performance Review
- Performance Review process is a “communication tool”
- Evaluate performance not personality
• Process starts with Feedback and Perspectives review
  – Tool to collect peer and colleague input.
  – Feedback and Perspectives effort is not the performance review
  – Forms are customized and deployed online.
  – Sent to customers (internal and external), colleagues, and direct reports (for managers only).
  – Employees submit names, and supervisor is able to substitute or add names to make up final list.
  – The results of the review will be shared with all managers in end of September (after the review meetings).
Cont...

• Next step: Self-Review process
• Managers should review the Self-Review when writing the employee’s evaluation
Next step: Writing the performance review

Ratings range from Unsatisfactory (Level 1) to Exceptional (Level 5)

Comments and examples are needed for those areas where demonstrated performance either does not meet expectations (I or U), or is beyond expectations (EE or E).

The median rating is Meets Expectations (ME). The University’s expectations regarding employee performance are very high, and therefore a “Meets Expectations” rating should be considered a positive evaluation.
How do I prepare?

• Gather:
  – the job description and performance objectives
  – goals set from the current review period
  – work rules and procedures
  – your documentation notes
  – any feedback or letters from customers/co-workers
  – current disciplinary memos
  – the previous performance review
What is the timeline?
<table>
<thead>
<tr>
<th>Action</th>
<th>Start</th>
<th>Finish</th>
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</thead>
<tbody>
<tr>
<td>Performance Review announcement and timeline sent via e-mail by VCRE-HR.</td>
<td>6/15/2015</td>
<td></td>
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<tr>
<td>VCRE-HR requests names for Feedback &amp; Perspectives (F&amp;P) survey. VCRE-HR sends specific instructions to supervisors on sending in names.</td>
<td>6/15/2015</td>
<td></td>
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<tr>
<td>Supervisors collect names for F &amp; P survey and submit to VCRE-HR per announcement. <strong>Deadline to submit names is 6/24/2015.</strong></td>
<td>6/15/2015</td>
<td>6/24/2015</td>
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<tr>
<td>VCRE-HR send F&amp;P to identified reviewers.</td>
<td>6/25/2015</td>
<td>7/8/2015</td>
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<td>VCRE-HR sends Cover Letter + Self-Review form to staff/Manager.</td>
<td>7/28/2015</td>
<td>7/31/2015</td>
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<tr>
<td>Employees complete Self-Review form. <strong>Deadline for submitting Self - Review form to managers is 8/14/2015.</strong></td>
<td>8/3/2015</td>
<td>8/14/2015</td>
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<tr>
<td>Supervisors write the Performance Reviews and conduct review meetings with their direct reports. Supervisors to send signed Performance Review packages to unit's point person for final review. VCRE-HR to send e-mail reminder to supervisors regarding reviews. <strong>Deadline to submit reviews is 9/11/2015.</strong></td>
<td>8/17/2015</td>
<td>9/11/2015</td>
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<td>Individual units forward finalized Performance Review packets to VCRE-HR.</td>
<td></td>
<td>9/11/2015</td>
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<tr>
<td>VCRE-HR tabulates F&amp;P results and share with managers.</td>
<td>9/14/2015</td>
<td>9/25/2015</td>
</tr>
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</table>
Which form do I use?

- Performance Review forms:
  - Non-Represented employees
    - Supervisor/Manager
    - Non-Supervisor/Manager (anyone with no direct reports)
    - Supplementary form: Individual Development Action Plan
  - Represented employees (Draft only, pending union review and approval)
    - Also available in Spanish and Chinese
Resources

- All performance review materials will be available on the HR shared folders-RED FOLDER or PD & C, and on VCRE webpage.
- Subsequent trainings will be conducted for managers of represented employees.
- Trainings also being conducted for represented employees.
- FAQ given by VCRE-HR.
- Collective Bargaining Agreements.
- Contact VCRE-HR.
Questions