All Staff Performance Appraisal Series

Part 2 | Understanding the Process

Please scan the QR code to the left or go to www.menti.com and enter voting code: 8261 2936
Timeline

- **April 10 – April 28**: Self Appraisals
- **April 28 – May 16**: Supervisors Draft Ratings
- **May 22 – June 2**: May 22 – June 2
- **June 5 – June 16**: Performance Check-Ins
- **June 16**: Evaluations Submitted
- **June 30**: Employees Acknowledge Receipt
Supervisors Draft Ratings

- Supervisor considers employee’s job description and job expectations
- Supervisor reflects on employee’s past year performance
- Supervisor drafts comments on and examples of employee’s performance
- Supervisor reviews employee’s self appraisal
- Supervisor reviews the rating scale definitions
- Supervisor considers how employee’s performance in relation to employee’s job expectations fits within the rating scale definitions
- Supervisors enter employee’s draft review in PeopleSoft

April 28 – May 16
1 – Needs Improvement

- Does not consistently meet all expectations
- Additional direction and support is required

Behaviors that might result in a 1 rating:
- Missing deadlines
- Work is not getting done
- Work quality is unacceptable
- Attendance Issues
- Creates or escalates conflicts

Documentation and/or actions associated with a 1 rating:
- Documentation of previous conversations
- Specific examples of unacceptable behavior or work product
- PIP
1.5 – Reliably Delivers

- Consistently meets expectations
- Sometimes needs additional direction and support beyond what would be expected in the role

Behaviors that might result in a 1.5 rating:

- Work ultimately gets done but employee might not really deserve the credit
- Might get the quality to an acceptable level eventually but not on the first try and not without extra guidance
- Is not always meeting attendance expectations or requires oversight to meet attendance expectations
- Doesn’t have serious conflicts with colleagues but does not have great working relationships and/or requires some level of mediation support

Documentation and/or actions associated with a 1.5 rating:

- Documentation of previous conversations
- Specific examples of below standard behavior or work product
- Specific examples of support beyond what would be expected
- Action plan
- Letter of expectation
- Additional training
Behaviors that might result in a 2 rating:
- Does everything that’s asked of them, sometimes a bit more
- Work gets done on time
- Work quality is very good
- No attendance issues
- Works effectively colleagues
- Requires a level of support that’s appropriate for the position

Documentation and/or actions associated with a 2 rating:
- No special/additional documentation required
- Typically, this is the score for approximately 60-70% of employees
Behaviors that might result in a 2.5 rating:

- Goes above and beyond what is asked
- Work quality is usually better than expected
- Work is done in less time than expected and/or is able to complete more work than expected
- Has very positive work relationships with colleagues

Documentation and/or actions associated with a 2.5 rating:

- Can provide multiple, specific examples of how work exceeds expectations from different quarters
3 – Consistently Exceeds

- Consistently exceeds or delivers beyond expectations
- Influences others to perform better

Behaviors that might result in a 3 rating:

- Work product is truly exceptional – almost always
- Has excellent work relationships with colleagues
- Positively influences and/or brings out the best in others

Documentation and/or actions associated with a 3 rating:

- Artifact documentation
- Specific examples of work that exceeds expectations from all four quarters
- Specific examples of this employee’s positive effect on the team
Calibration is the process of reviewing performance evaluations to ensure consistency across units, college/school/division, and UMSL.

At UMSL, Vice Chancellors will review draft ratings of their units and discuss with leaders to help catch errors, ask about patterns, etc.

Calibration is NOT Vice Chancellors forcing supervisors to change scores.

May 22 – June 2
Why Calibrate?

Consistency

Fairness

Growth

Accountability
Costs of miscalibration

Demotivates High Performers

Complicates addressing performance issues

Defeats the growth tool value

Creates difficulty in identifying who to recognize and compensate
The goal of merit-based pay is to reward performance, with employees with higher performance receiving the largest increases.

Merit-based pay is one type of pay increase, designed for a particular purpose.
This year, justification has allocated 3% of the payroll budget for merit-based pay increases.

Compensation accounts for 62% of UMSL’s Operating Expenses.

FY23 BUDGET - OPERATING EXPENSES $224 MILLION

- Compensation: $139; 62%
- Supplies, Services & Other Operating Expenses: $61.2; 28%
- Interest Expense: $5.1; 2%
- Depreciation: $18.2; 8%
We will have a set amount of money allocated for merit increases.

The total amount of money allocated to merit increases remains the same regardless of the rating distribution.

Thus, the rating distribution does not affect the total amount of money allocated – it effects how the total amount is allocated.
• Your supervisor will reach out to schedule a meeting
• At your meeting you can expect to discuss
  • Your job expectations
  • Your self appraisal
  • Accomplishments
  • Challenges/setbacks
  • Resources/training
  • Career development
  • Your supervisor’s evaluation of your performance
• Join us for the next part in this series to get yourself prepared to approach feedback in a productive way
Evaluation Submitted & Received

- Supervisor reviews and submits evaluation
- Employee receives an email notice of submission
- Employee checks a box to acknowledge receipt
- Employee may also enter comments into the comment box
- Supervisor receives an email notice that employee has acknowledged receipt and can review employee comments
- Join us for the final session in this series to discuss what to do after you’ve received your evaluation

June 16

Evaluations Submitted

June 30

Employees Acknowledge Receipt
What are your takeaway messages and/or lingering questions?

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Next in this Series

Part 2 – Understanding the Process
Tuesday, May 9, from 10 – 10:45am CT

Part 3 – Approaching Feedback
Tuesday, May 23, from 10 – 11am CT
Monday, June 5, from 1 – 2pm CT

Part 4 – What Now?
Tuesday, June 20, from 10:30 – 11:30 am CT
Monday, June 26, from 2 – 3pm CT

*Also, mark your calendars for staff development week! May 15-19