

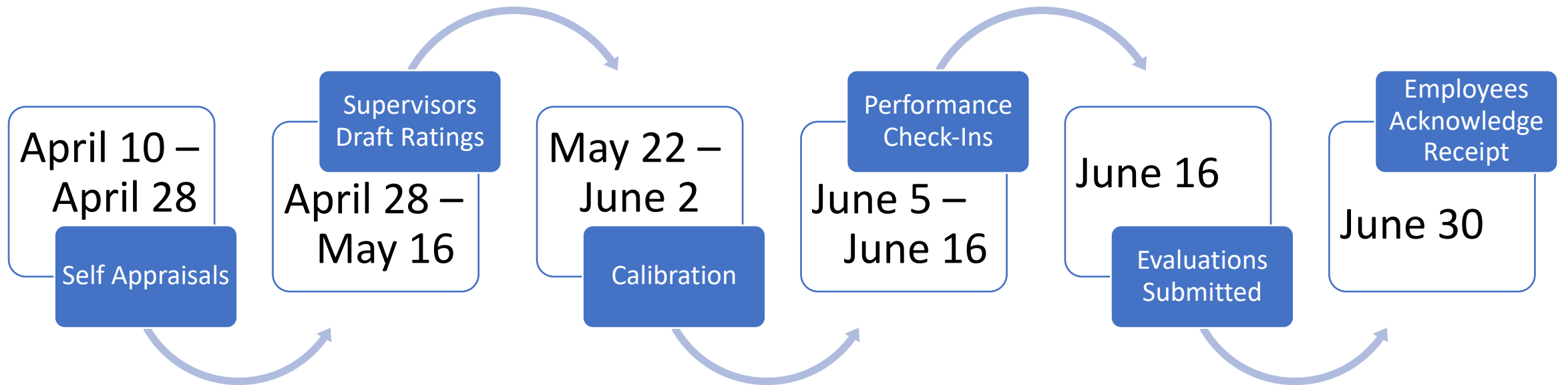


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# All Staff Performance Appraisal Series

Part 2 | Understanding the Process

# Timeline



# 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

Supervisors  
Draft Ratings



## 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



## 2 – Reliably Delivers

- Consistently meets expectations and
- might exceed some expectations
- Requires little to no additional direction to achieve established responsibilities

### **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

## 2.5 – Reliably Delivers

- Frequently delivers beyond that which would be expected in the role

### **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

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

Calibration

# Why Calibrate?



Consistency



Fairness



Growth



Accountability



# Costs of miscalibration

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Demotivates High Performers

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Complicates addressing performance issues

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Defeats the growth tool value

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Creates difficulty in identifying who to recognize and  
compensate

# Merit Based Pay Increases

Merit-based pay is one type of pay increase, designed for a particular purpose

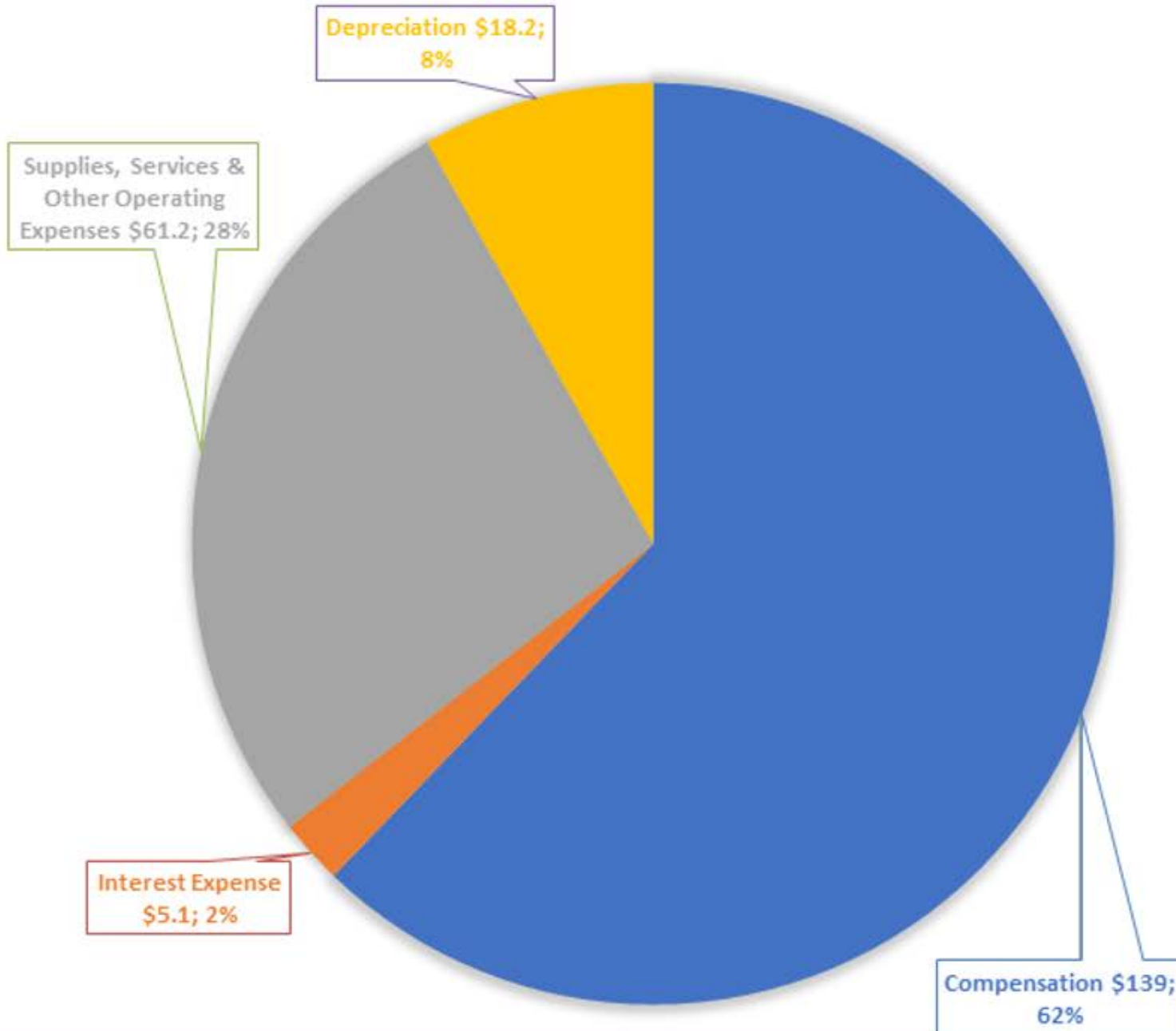


Lower Score,  
Lower % Increase

*The goal of merit-based pay is to reward performance, with employees with higher performance receiving the largest increases*

Higher Score,  
Higher % Increase

## FY23 BUDGET - OPERATING EXPENSES \$224 MILLION



**Compensation accounts for 62% of UMSL's Operating Expenses**

This year, justification has allocated 3% of the payroll budget for merit-based pay increases

**UMSL**

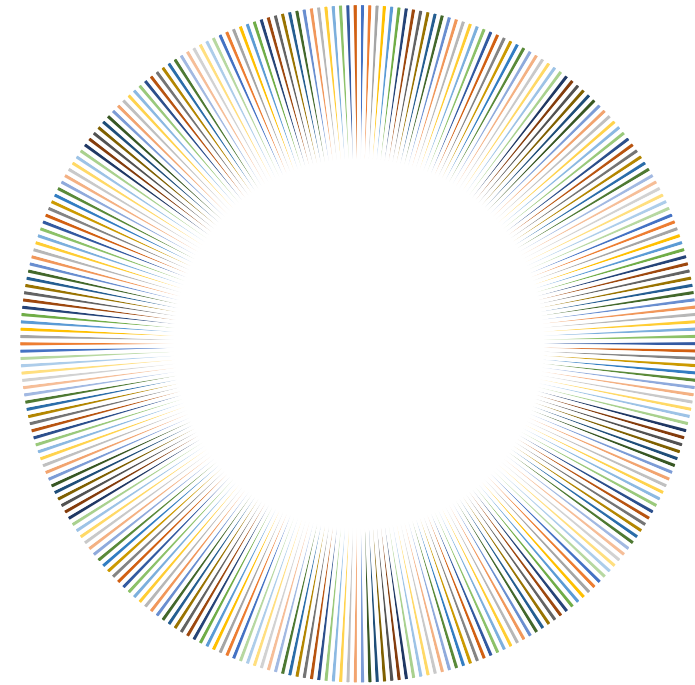
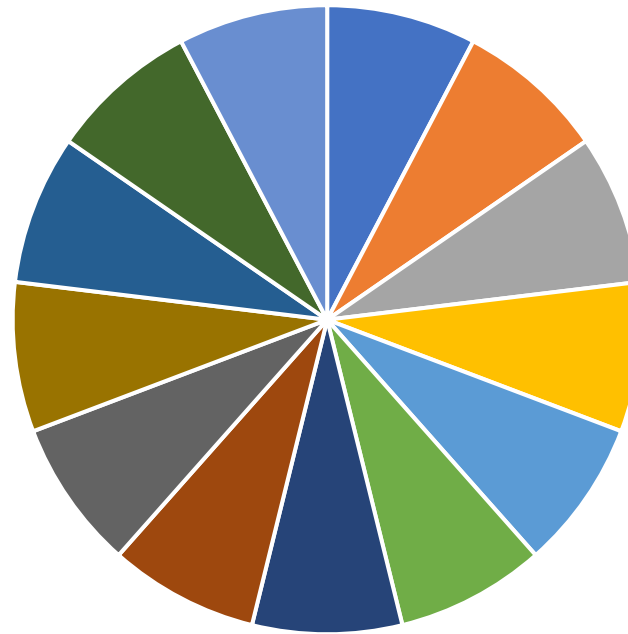


# Rating Distribution & Merit Pay

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



# Performance Check-Ins

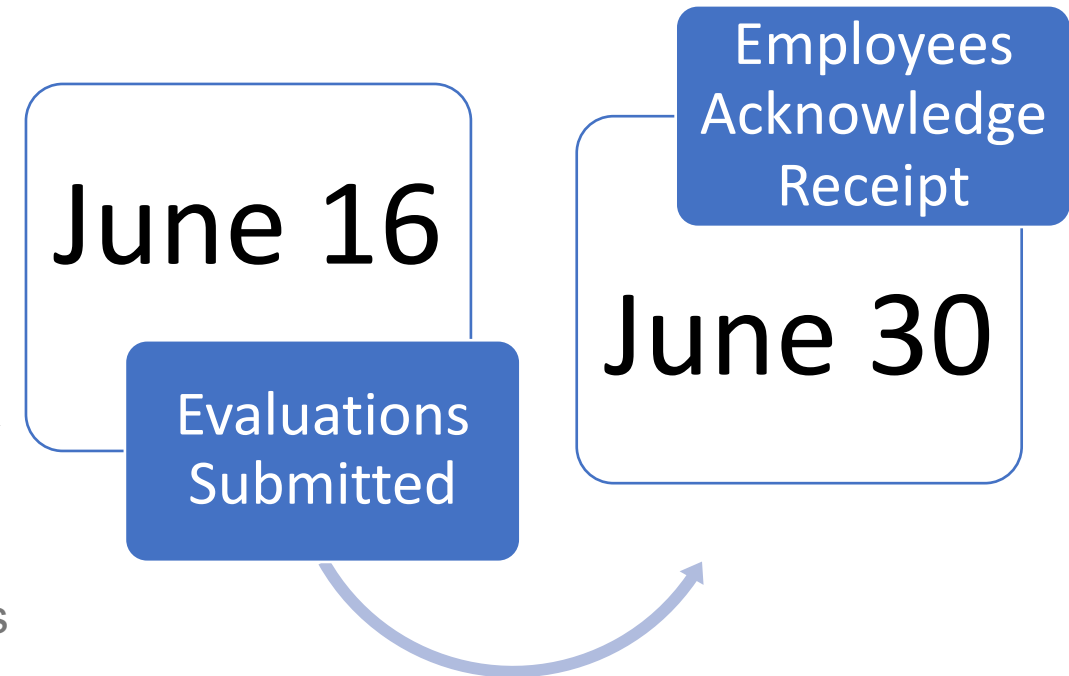
- Your supervisor will reach out to schedule a meeting
- At your meeting you can expect to discuss
  - Your job expectations
  - Your self appraisal
  - Accomplishments
  - Challenges/setbacks
  - Resources/training
  - Career development
  - Your supervisor's evaluation of your performance
- Join us for the next part in this series to get yourself prepared to approach feedback in a productive way

June 5 –  
June 16

Performance  
Check-Ins

# 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



# 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***