



Staff Performance Evaluations

BARBARA FORREST, DIRECTOR OF HUMAN RESOURCES

ASHLEY BAUGH, ASSISTANT DIRECTOR OF HUMAN
RESOURCES

VANESSA COTTINGHAM, SENIOR HR GENERALIST



Agenda

During this meeting, we will review:

- ▶ Our performance appraisal process
- ▶ How to complete a performance evaluation online using PeopleAdmin
- ▶ Management of online evaluations for supervisors



Performance and Salary Administration Goals

1. Attract and retain competent, well-qualified employees;
2. Clarify expectations for employees;
3. Motivate employees to improve job performance where needed;
4. Reward employees for outstanding job performance;
5. Strive to maintain salaries that are internally fair and externally competitive;
6. Provide a means for budgeting and controlling salary expenses.

Policy 04:035





UM Policy

- ▶ Each employee's performance is to be appraised at least annually by the immediate supervisor using the PeopleAdmin Performance Module.
- ▶ All new and rehired employees should receive an informal performance evaluation after the first 90 days.
- ▶ All employees should be reviewed during the regular evaluation period, regardless of hire date.



Policy 04:035



Merit Pay

Grading Scale

Overall score will fall within one of the following ranges:

Range 1.00 - 1.55 = 1 (Below Expectations) Not eligible for an increase

Range 1.56 - 2.55 = 2 (Meets Expectations) Across the Board (ATB) increase – no merit pay

Range 2.56 - 3.55 = 3 (Exceeds Expectations) ATB plus lowest merit pay

Range 3.56 - 4.00 = 4 (Exceptional) ATB plus highest merit pay

HIRE DATE	SALARY INCREASE ELIGIBILITY
January 1—June 30 2019	Regular Eligibility (in accordance with Merit Guidelines)
July 1—December 31 2019	Across the Board (unless the individual earns an overall score of 1, in accordance with Merit Guidelines)

*All increases are subject to available funds and approval by the Board of Trustees



Timeline

- ▶ February 1– March 31: Evaluations Conducted and Plans are Acknowledged
- ▶ April 10: Completed evaluations are due to HR
- ▶ April 10—May 15: Appeal Review Process
- ▶ May 15-June 15: HR review of finalized evaluations; score calculations to VPBA
- ▶ July: Presentation to Budget & Finance Committee at Special Meeting
- ▶ August: Recommendation for salary adjustments presented to Board of Trustees
- ▶ If approved at August BOT meeting, HR issues employee salary notification changes as appropriate
- ▶ September 1: Salary adjustments effective for non-grant funded positions

Note: The BOT reserves the right to delay salary increase discussions until after Fall semester enrollment data is assessed.



Performance Evaluation Steps

1. January 2020 - Employee completes self-evaluation

Note: Individual scores of a 1 or 4 require supporting documentation

2. Supervisor completes evaluation from which scores are determined

Note: Individual scores of a 1 or 4 require supporting documentation

3. Reviewing officer acknowledges evaluation

4. Employee and supervisor meet to review evaluation, discuss performance, goals and development plan

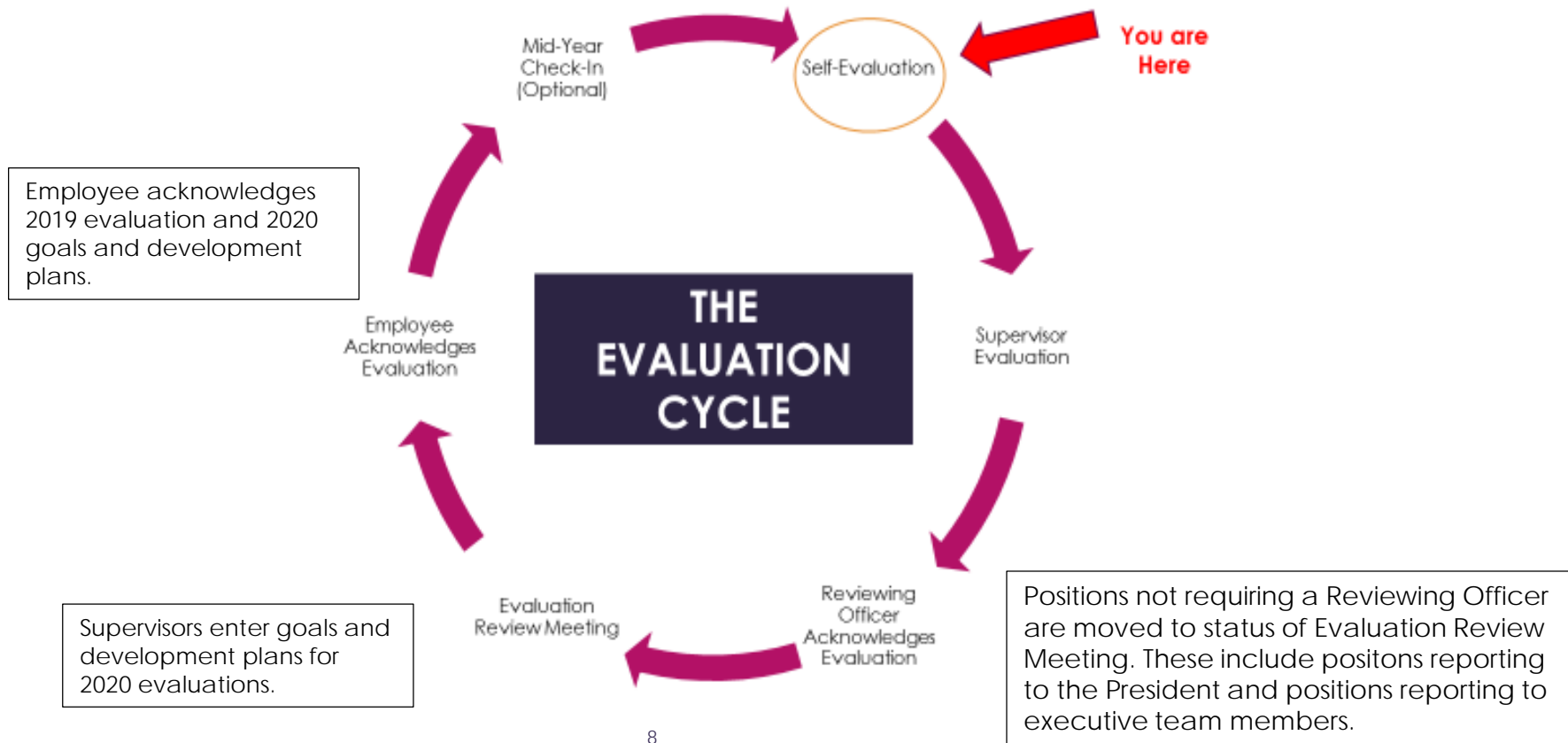
5. Supervisor enters goals for 2020 in collaboration with employee

6. Employee acknowledges 2019 evaluation and the 2020 goals

7. April 10th 2020 - Evaluations due (electronically) to HR



How it works...





Getting Started

<https://jobs.montevallo.edu/hr>

Username: UM username

Password: UM password



Click on the three dots next to Performance





How to Log-In

Go to: <https://jobs.montevall.edu/hr>

Enter: UM Username and Password

University of Montevallo

Username

Password



Performance Portal

- ▶ Change your user role to Employee
- ▶ Click " On the three dots to enter the University of Montevallo Employee Portal." If you do not see this icon, call Human Resources at 6055.

Enter Performance Portal

Role

Performance

Welcome, vanessa Test My Profile Help logout

User Group:
Employee

Home Shortcuts

Users / Vanessa Test ()

User: Vanessa Test
Current Status: Approved

Vanessa Test
HR Generalist
Username:
Supervisor: Testing Forrest
Email: emailaddress@zed.zed
Phone:

Groups
Administrative Assistant
Budget
More...

Take Action On User



APPEAL PROCESS

The final evaluation is designed to be completed as an interactive process to include discussion between the employee and their supervisor. An employee has the right to make appropriate comments (good or bad) on the final evaluation form or attach a statement indicating disagreement with the supervisor's assessment. Signing or acknowledging an evaluation form is not an indication that the employee agrees or disagrees with the final result. It serves as verification that the employee participated in the process.

- ▶ *The final form and attachments will be reviewed up the chain of command to the VP/head of the division; thus, at any juncture, an evaluation can be selected for reassessment. Furthermore, an employee can request reconsideration of specific disputed or unresolved issues; that request can be made to anyone in the employee's chain of command, starting with their immediate supervisor.*
- ▶ *If the employee appeals to the VP/head of his/her division and is not satisfied by the outcome, the employee can appeal, in writing, to the Director of HR **on or before April 10.***



APPEAL PROCESS

- ▶ The appeal should clearly state the disputed information and contain evidence to support the employee's position.

The Director of HR will conduct an impartial review of the facts submitted by the employee and follow up with an investigation. If the employee is still not satisfied with the results of the investigation, he/she can utilize the formal appeals process stated in UM policy. If, at any point, an evaluation is reassessed and adjustments are made, the employee will be notified; changes will be discussed and the employee will be asked to sign the revised evaluation.



APPEAL PROCESS

It is important to reiterate that the evaluation process should be interactive and an employee should not feel apprehensive for requesting reconsideration of an evaluation item. The goal is for discrepancies to be appropriately addressed by personnel in an employee's department or division. If not, the Director of HR will serve as an additional line of assistance for the employee.

Performance Evaluation and Salary Administration Timeline:

- ▶ Performance Period: Calendar Year (January —December)
- ▶ February 1– March 31: Evaluations Conducted
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- ▶ **April 10—May 15: Appeal Review Process**
- ▶ May 15-June 15: HR review of finalized evaluations; score calculations to VPBA
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- ▶ August: Recommendation for salary adjustments presented to full Board
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Parting Thoughts

- ▶ Ask your supervisor if he/she has any internal deadlines set for your self-evaluation
- ▶ All evaluations and plans should be completed and acknowledged by the employee no later than April 10th.
- ▶ Contact your supervisor or HR if you have questions
- ▶ Final thoughts?

THANK YOU FOR YOUR TIME!!!