



Performance Management

"Phase 3"

Quick-Refresher

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What is Performance Management?



- The **ongoing** function and **collaboration** effort of supervisors and managers with their employees to ensure that the employees are productive and continuously meeting organization goals.
- The process used to provide **feedback** to employees on how well they are performing, compared to their Core Responsibilities.

Performance Management involves...



- Explanation of performance expectations or *Core Responsibilities*.
- Giving performance *feedback* throughout the year.
- *Evaluation* of performance in meeting expectations.
- Using the *Employee Work Profile* form.

Performance Management Cycle

PHASE 1

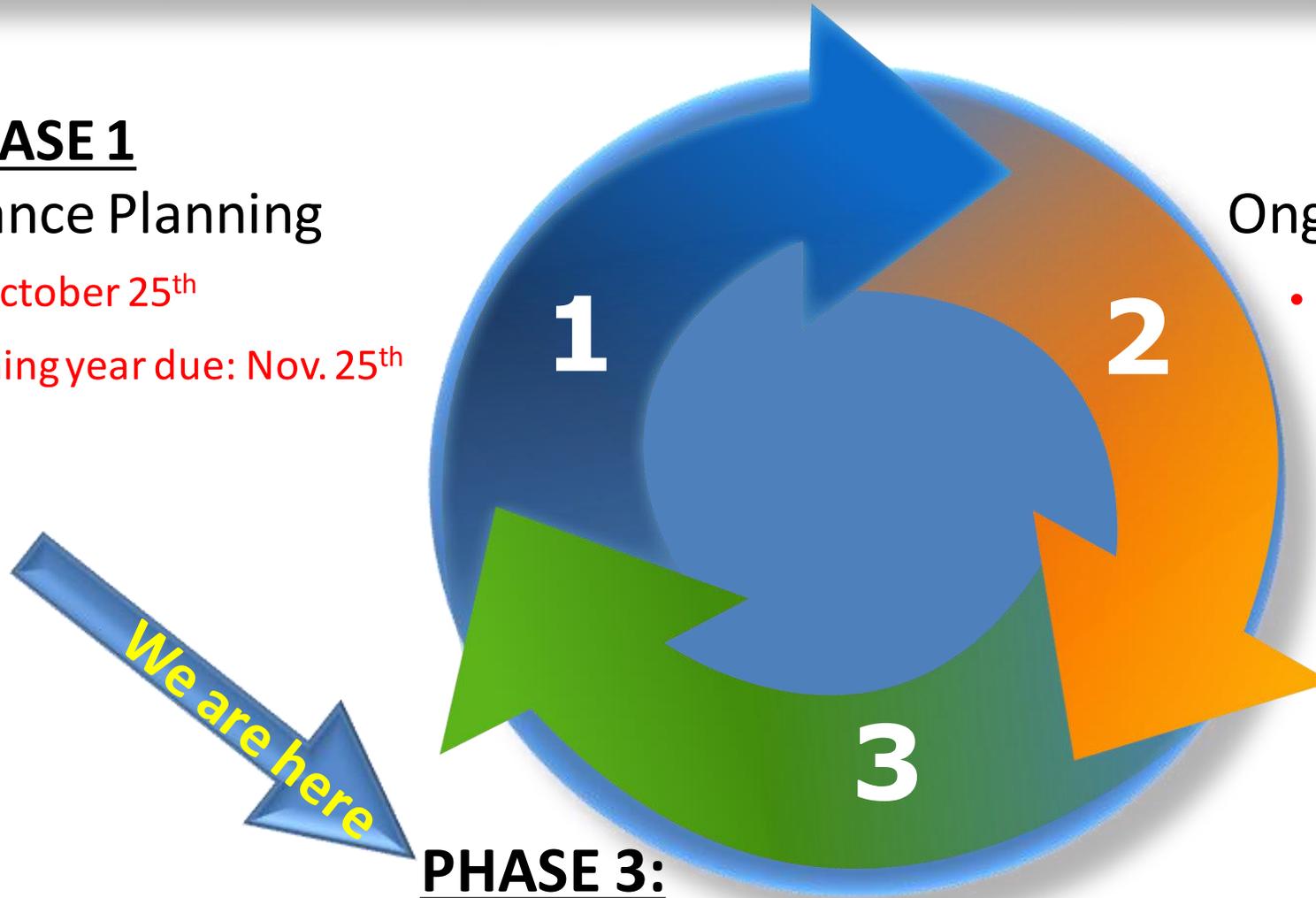
Performance Planning

- Cycle begins: October 25th
- Plan for upcoming year due: Nov. 25th

PHASE 2

Ongoing Feedback

- Throughout the year



PHASE 3:

Performance Evaluation

- August 10th – October 24th

Who Should Be Evaluated?



A **performance evaluation** will be completed by you for the following employees:

- Classified
- Faculty Administrators (FA)
- **Do not** evaluate Non-classified (Wage, Hourly, P-14, Temporary)

Important Change!

Wage employment is intended to be temporary. There should be no expectation of a formalized performance cycle for these roles.

- **Do not** evaluate temporary agency resources such as Caliper

Supervisors/Managers Performance Evaluation Do's & Don'ts....



DO



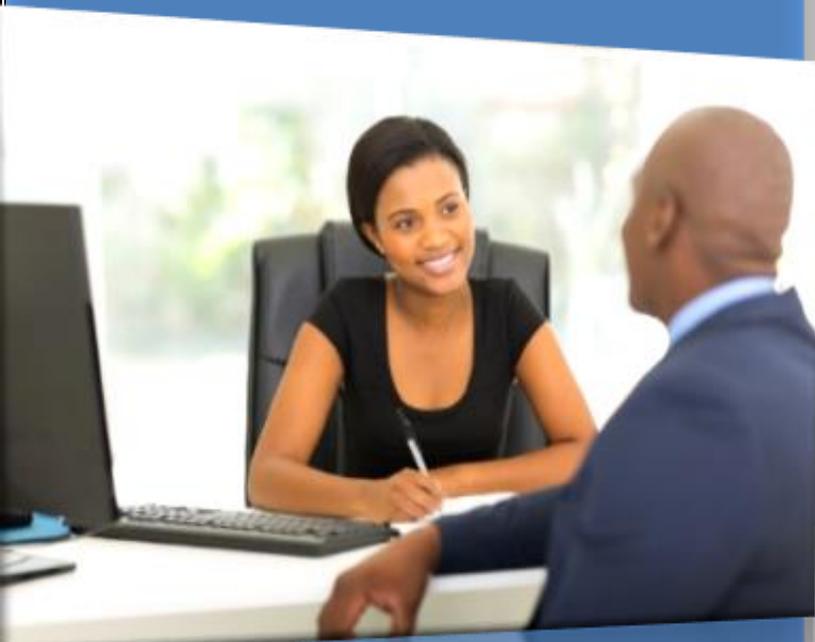
- Recommend and encourage employees to write a self-evaluation.
- Gather and use performance documentation, such as, but not limited to: EWP/job description, Core Responsibilities, Standard Operation Procedures (SOP), Customer feedback forms, Supervisors observation).
- Rate all Core Responsibilities and the overall performance.
- Complete EWP and Performance Evaluation; get the appropriate signatures.
- Meet with the employees to discuss the evaluation.
- Refresh comments each year to reflect current performance.

DON'T



- Penalize or reprimand employees who choose not to complete a self-evaluation.
- Rely on memory to document how well employee achieves performance goals.
- Assign rating without a narrative to support it.
- Submit EWP or Performance Evaluation without appropriate signatures.
- Email or give an employee their evaluation without having a conversation.
- Copy and paste comments from previous performance cycle.

Supervisors/Managers Performance Evaluation



EWP Discussion Reminders

**Important
Change!**

DO:



Inform the employee that in **addition** to duties and responsibilities listed on the **EWP**, he/she may be required to perform **other duties** as assigned.

DO:



Engage the employee in a two-way conversation and ask: **“What are your thoughts about the statement, performs other duties as assigned?”**

DO:



Exercise **best management practices** in assigning "other duties" in consistent with the job classification, the compensation level and the nature of work.

During Phase 3, **employees** will...



- Document self-evaluation.
- Provide input to supervisor.

Reminder

Important Calendar Dates



- Probationary employees hired **on or before January 24th** should be evaluated using the full *'Employee Work Profile (EWP) Performance Evaluation'* form.
- Employees hired from **January 25th through July 24th** should be evaluated using a *'Probationary Progress Review'* form (3-month, 6-month or probation end date).
- Employees hired **after July 25th** will **not** need to be evaluated in this performance cycle.
- Annual performance evaluations must be completed by **October 24, 2019.**

Helpful Resources

The next **three** slides introduce resources to support your success.

Policy: 1.40.
Performance
Planning and
Evaluation



Online Training
Module



COVLC

How to Access
Performance
Management
Forms

Evaluator Name		Employee Name	
Position Title		Evaluation Period	
Department			
EVALUATION CRITERIA			
Exceeds	Performance consistently exceeds acceptable standards of performance for the position.		
Meets	Performance consistently meets acceptable standards of performance for the position.		
Approaches	Performance does not completely meet acceptable standards of performance for the position.		
Needs Improvement	Performance does not meet acceptable standards of performance for the position.		
CORE COMPETENCIES			
1. Job Knowledge	Demonstrates thorough knowledge and understanding of the position. Actively maintains current to enhance job knowledge and skills.	E	M
2. Leadership	Exhibits the highest degree of professional skills to complete goals and objectives. Accepts accountability for progress in area of responsibility.	E	M
3. Communication	Effectively provides communication in a professional, clear and accurate manner. Accepts constructive feedback and offers alternatives.	E	M
4. Resource Management	Effectively utilizes the departmental and organizational resources. Demonstrates time management and fiscal responsibility.	E	M
5. Quality of Work	Achieves an acceptable level of productivity in a timely and accurate manner. Organizes strategies and services to accomplish performance objectives.	E	M
6. Collaboration	Works cooperatively with others and promotes a positive team environment.	E	M
7. Community Relations	Effectively supports the organization's mission and strategic plan. Involvement in organizational events, committees, and special projects.	E	M
8. Professional Development	Continually engaged in professional development. Attends professionally related seminars and pursues learning opportunities.	E	M
9. Overall Performance Rating	Review summarizes the employee's job performance and provide specific feedback.	E	M

Policy 1.40

Performance Planning and Evaluation

This policy provides for:

- the establishment and communication of employees' performance plans and procedures for evaluating employees' performance

This policy applies to:

- full-time classified employees
- part-time classified employees

Nine **important** topics with supporting sub-topics are explained.

Click [here](#) to **view** Policy 1.40



Policy 1.40. Topics

1. Performance Planning & Evaluation Definitions
2. Performance Plans
3. Documentation During the Performance Cycle
4. Personnel Changes
5. Conducting Performance Evaluations
6. Performance Increases
7. Appeals
8. Re-evaluation
9. Retention of Performance Forms

Online Training Available!



MVP HR Policy & Law - Performance Management

• Online Course

Description

This web-based course includes five modules and will help you learn how to get the most out of your work unit and be able to use the state system and forms appropriately in managing your employees.

By the end of this course, you will be able to

- **develop** an effective Employee Work Profile
- **document** appropriate facts
- **give** constructive feedback
- fairly **evaluate** an employee's performance

NOTE: This module also explains the supervisor's responsibilities during a new employee's **Probationary Period**.

This online course will take approximately 2.5 hours.

How to Access MVP HR Policy & Law – Performance Management

1	Copy the following link into the browser.	https://covlc.virginia.gov
2	Click the 'Log In' button. (Do not click 'Need an account')	
3	Enter your personal 'Log In ID' and 'password'. If you've forgotten it, click " Forgot your login or password " (underneath blue 'Log In' button)	
	OR	
	Enter your 'State Employee ID# (seven digits) as your 'Log In ID'. To get a temporary password: Click " Forgot your login or password " (underneath blue 'Log In' button).	
	NOTE: A temporary password will be emailed to you within a few minutes.	
	<ul style="list-style-type: none"> • For support - Contact your Agency/Domain Administrator: Robin Franklin-Morton phone: (804) 524-1098; email: rfranklin-morton@vsu.edu 	
4	Search for the course	Click 'CATALOG' on the blue menu at top of screen.
5	In 'Search for' field	Type 'MVP HR Policy & Law Performance Management'
6	Click 'Search' button. A list of courses will appear.	
7	Click on the course 'MVP HR Policy & Law Performance Management'	

How To Access Performance Management Forms

- To access a **specific** form, click the associated link in the ‘Link’ column
- FYI – All original forms are located on: ‘S’ drive> HR-Perf Mgt. - Forms

Form	Description	Link
Employee Self Evaluation	The employee’s self assessment of his/her job performance for the rating period	Click Self Evaluation to access form
Employee Work Profile	A combination of the employee work description, performance plan, and evaluation assessment.	Click EWP to access form
Extraordinary Contribution	Documents and recognizes extraordinary contributions made in the performance of duties.	Click Extraordinary to access form
Group1, Group2, Group3 Offenses	Example of Offenses Grouped by Level	Click here to access Group 1-3 Offenses
Interim Evaluation	Documents the employee’s progress or to provide feedback to the employee at any time during the probationary period.	Click Interim to access form
Improvement Needed/Substandard Performance	Documents that immediate improvement in the performance of your duties must be made.	Click Improvement Needed to access form
Performance Evaluation Form	Documents feedback to the employee regarding job performance for the rating period.	Click Evaluation to access form
Performance Evaluation: Non-Academic FAs	Documents feedback to Non-Academic Faculty Administrators regarding job performance for the rating period.	Click Non-Academic FAs to access form
Probationary Progress Review	Review of performance progress during interval 3-month, 6-months, or probationary period end timeframe.	Click Probationary to access form
Written Notice	May be used in place of Improvement Needed Form.	Click Written Notice to access form

When You're Done!

1.

Check **signatures** and **dates**.



**Important
Change!**

2.

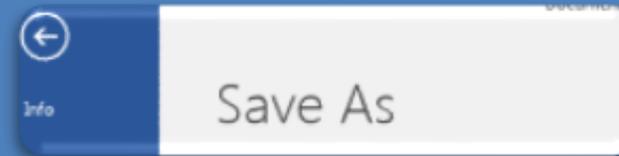
Scan evaluation.



**Important
Change!**

3.

Save document



with the correct **naming convention**

Employee's Last name.First initial.Department
(example: Doe.J.OHR)

Due Date

Thursday,
October 24, 2019

**Important
Change!**

4.

Email evaluation to:



HR@vsu.edu

Do **not** send hardcopy to VA Hall.

Note: Hardcopy will be **returned** to you.

Thank You!



Office of
Human Resources