

Evaluating Staff Performance

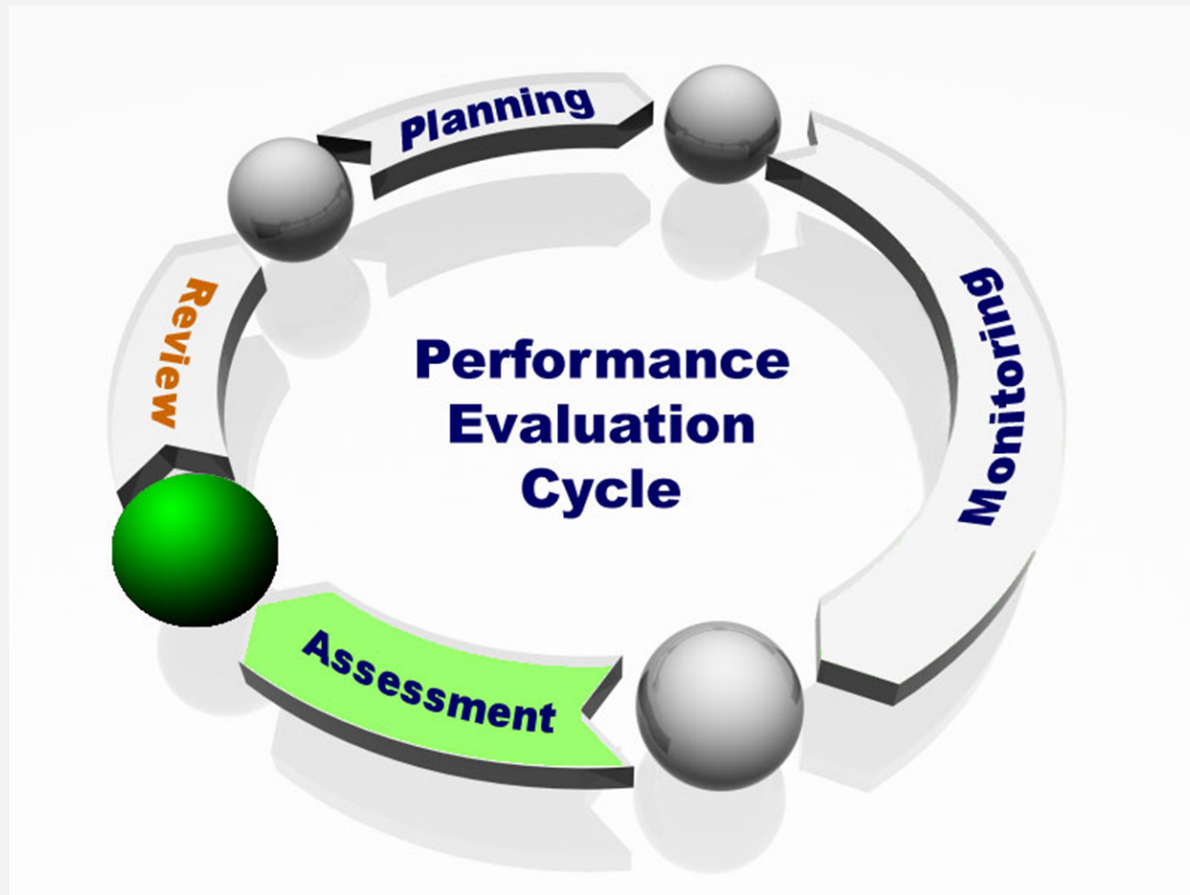
Office of Human Resources

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Staff Performance Evaluation

Annual cycle: February 1 thru January 31



UTSA Staff Performance Evaluation Process

Four Phases of Evaluation Process:

- Performance Planning
 - During months of February 2016 – April 2016
- Monitoring & Feedback (throughout year)
- Performance Assessment
 - During months of December (2016) & January (2017)
- Performance Evaluation Meeting
 - February 2017

Performance Planning

At the beginning of the rating period

- Collaborate with the employee
 - Define essential job functions (deliverables)
 - Set performance standards
- Formally communicate expectations to the employee
- Follow-up throughout the year

Essential Job Function & Standard (Sample)

Essential Job Function (Deliverable)

- Maintain monthly and annual department budgets
 - Provide accurate & timely data to management
 - Alert management of potential issues
 - Train other departmental users as needed

Standard:

- Reconcile monthly budget reports, distribute to management team within 10 days of receipt, & highlight via email:
 - Monthly variance exceeding 10%
 - Anticipated year end shortfalls
- Complete monthly ProCard reconciliation in 3 weeks
 - Ensure Dept users know ProCard policies – conduct semi annual education training
- Demonstrate knowledge of key contacts, points of problem resolution
 - Maintain-up-to date contact list and actions for problem resolution
 - Ensure back-up is aware of contacts and actions for problem resolution

Opportunities for Improving Performance

- Clarify expectations - ensure employees know what they need to do to succeed in job
- Address performance/behavioral issues in a timely manner
 - Don't wait for problem to go away, or fix itself
 - Reassigning to different work group is not effectively addressing the issue
- Contact Employee Relations for advice
- Address positive performance as well
- Document Negatives & Positives

Opportunities for Improving Performance

- Provide honest performance assessment and documentation on the Annual Performance Evaluation Review
- Consider this as resource for internal reclassifications/promotions
- Review prior UTSA performance as you consider hiring decisions

Performance Assessment

3rd Phase - Performance Assessment (Dec-Jan)

As we near the end of the performance year

- Review Essential Functions/Projects and Standards
- Review Attributes
- Gather relevant data
 - Objective and Subjective Data

Performance Assessment Writing Results

- Be Honest
- Be Clear & Concise – Keep it Simple.
- Check Spelling & Grammar
- Use objective results whenever possible
- Back up subjective results with examples
- Eliminate any reference to legally protected rights

Performance Evaluation Meeting

Delivering the Message

- Avoid surprises
- Collect information and materials
- Set a time and date to meet
- Reserve a private area to meet
- Consider giving employees an advance copy
- Prepare for potential conversation obstacles

For the end of this performance year:

- Prepare annual evaluation review for each benefits-eligible staff employee
 - Gather and assimilate performance data from 2/1/16 – 1/31/17
 - Complete Performance Evaluation Review form
- Conduct Reviews with each employee during February 2017
- Copies arrive in Human Resources by Tuesday, March 1, 2017

Thank You!



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