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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