

# 2015-2016 Creighton University Annual Staff Performance Review

## Frequently Asked Questions

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## Frequently Asked Questions

### TIMELINES and PROCESS OVERVIEW

#### 1. What is this performance review period and the final review due date?

The final review is due August 1, 2016. The review period is July 1, 2015 – June 30, 2016.

#### 2. Who needs to complete a performance review?

All individuals in staff positions, other than temporary or seasonal employees, are required to participate in the annual performance and salary review process as detailed below. This does include grant-funded positions.

- **Performance Reviews:** All eligible employees in staff position on or before April 1, 2016 are to receive a performance review.
- **Annual Salary Review:** All eligible employees in staff position on or before April 1, 2016 will be included in the annual salary review process, effective October 1, 2016.
- **Recent Hires:** All eligible employees hired after April 1, 2016 will not receive a 2015-2016 performance review nor will they be included in the annual salary review process, effective October 1, 2016.
- **Recent Transfers/Promotions:** Managers are responsible for completing performance reviews for staff transferring to their workgroup during the review period, with input as appropriate from the individual's previous supervisor.

#### 3. What happened to the "Self-Assessment?"

Based on employee feedback, the Self-Assessment tab was removed because it was found to be redundant to the existing questions posed in the existing Objectives and Competencies tabs. In order to complete this year's Self-Review, the employee will complete the Objectives, Competencies and Summary tabs.

#### 4. What are the steps of the performance review process? \* dates are recommendations, not hard deadlines with the exception of August 1, when the review phase closes.

The five steps of the review process are:

1. Staff member completes individual self-review, which includes the Objectives, Competencies and Summary tabs, and submits to supervisor/manager. (dates 5/16/16 - 6/6/16)
2. Supervisor/Manager completes preparation for performance review of each staff members (dates 6/6/16 - 6/30/16).
3. Conduct performance review meeting with each staff member to discuss performance over the past year and plans for the next year (dates 7/1/16 - 7/31/16).
4. Staff member reviews, signs and provides comments to the performance review

(7/1/16 - 7/31/16).

5. Supervisor/Manager submits completed review to Human Resources (date 8/1/16).

**For a staff members working a 9 or 10 month assignment and will be out of the office during the months of June and July, complete the performance review prior to them departing following the key dates recommendations below. The review phase is open beginning April 1, 2016.**

1. Staff member completes individual self-review and submits to supervisor/manager. (dates 4/1/16 - 4/18/16).
2. Supervisor/Manager completes preparation for performance review of each staff members (dates 4/18/16 - 4/30/16).
3. Conduct performance review meeting with each staff member to discuss performance over the past year and plans for the next year (dates 5/1/16 - 7/31/16).
4. Supervisor/Manager submits completed review (deadline date 8/1/16).

**5. Where is the performance review form, instructions and employee self-reflection?**

They can be accesses at <https://creighton.harvesthcm.com/Performance/Default.aspx>. Please use your Net ID and BLUE password to log in. Additional tools, resources and training can be located on the Human Resource Performance Management Website <http://www.creighton.edu/hr/performancemanagement/index.php>

**6. Who has rights and responsibilities in the on-line performance review system?**

The system roles and responsibilities are as follows:

- **Supervisor/Manager:** Individual responsible for the work performance of staff member(s). Performance Review Process-Specific Responsibilities: Preparation, Writing Review, Conducting Review Meeting and Finalizing Development Plan. Access to on-line system read and edit rights to staff review.
- **Next Level Reviewer:** Manager or Director one level up from the evaluating supervisor/manager. Responsible for providing evaluating supervisor/manager with appropriate coaching and oversight in evaluating his/her staff. Access to on-line system read rights to staff reviews.
- **Division/College/School Leader:** Dean, Division Vice President, Senior VP Operations, Provost. Responsible for division/college/school-level staff evaluation process and pay decisions in accordance with Creighton University guidelines. Access to on-line system read rights to staff reviews and the ability to run ad-hoc division-specific compliance reports.

## **GOALS and OBJECTIVES**

**7. Are establishing goals a requirement of the review process?**

Yes, establishing goals is part of the Creighton annual staff review process. Well-designed goals serve to guide and focus individual's performance on the most important priorities for the year and they enable supervisors/managers to more objectively and accurately measure performance. The best practice is to write SMART (specific, measurable, attainable, relevant,

and time-bound) goals, aligned to the Creighton University priorities. Goals should be mutually agreed upon and reflect the most important priorities for the performance review period.

Goals/Objectives from 2015/2016 will be discussed and reviewed. A follow up meeting will be established between supervisor and staff member within 30 days to create or expanding on goals and objectives for 2016/2017.

**8. Why do objectives have to align with the University's strategic priorities?**

It's important that each person understands how their job responsibilities contribute to the attainment of the University's goals. Getting both people and departments, schools or colleges to align goals with the overall Creighton strategic priorities results in more meaningful work, higher productivity and much less frustration with the institution.

**9. Who should set my objectives, me or my manager?**

Managers and direct reports should set objectives together. Each school, college or department should articulate department objectives and the University's strategic priorities to staff at the beginning of the performance year so that individual objectives can be based on accomplishing department objectives.

**10. How do I set individual objectives when my job doesn't change and I perform the same tasks every day?**

All positions at Creighton should have specific objectives. You should refer to your job description, your department objectives and the University's strategic priorities when setting your individual objectives.

**COMPETENCIES**

**11. What if some of the supervisory competencies pertain to me, but some don't?**

Your manager only needs to rate you on the items that pertain to your position. For example, not all managers/supervisors have financial management responsibilities.

**12. If I supervise student workers, should my manager complete the non-supervisory competency checklist or the supervisory competency checklist?**

Your manager should complete the competency checklist on page 2, but some items on page 3 might be applicable. In that case, the manager should rate you on the items that are applicable to you.

**RATING**

**13. How do you come up with an overall rating when there are no numbers or calculations involved?**

The overall rating should be determined by assessing the employee's overall performance. For example, if an employee generally meets all objectives and has some areas of improvement, but might also exceed objectives on occasion, they should be rated "meets". If an employee

always meets and consistently exceeds objectives in most categories, then the employee should be rated as “exceeds”. If an employee does not consistently meet objectives and needs improvement in several areas, then “needs improvement” would be appropriate.

#### 14. How do I know what is considered “Exceeds” vs. “Meets”?

The performance level key is located in the Evaluation Instructions document and on the performance review form.

### COMPLETING THE REVIEW AND REPORTING

#### 15. My employee says they cannot see my comments but I have completed them, what does that mean?

A lot of the questions refer to the manager saying the employee cannot see their comments. This is usually due to the employee being in the “employee review mode”, highlighted below by those with a yellow bar in that column. Once the employee goes to the summary tab and selects “I am done with my self-review” button, the manager (after they complete their review, will then need to select their **“I am done with the review”** button on the summary page. They will need to this when the bar in the “Manager Review” column is yellow. Once that is done the bar will change to green.

Employee ID	Employee Name	Job Title	Planning in Progress	Employee Planning	Manager Planning	Review in Progress	Employee Review	Manager Review	Share Review	Sign Review	Status	Change Status	Overall Rating
22771	Drzas, Thomas Eugene (Tom)	Associate Director	Complete	Complete	Complete	Complete	Action Needed	Action Needed			Employee Review Completed	<Select>	
14214	Cerfi, Jason E	Senior Compensation Analyst	Complete	Complete	Complete	Complete	Action Needed	Action Needed			Employee Review Completed	<Select>	
3414	Mahoney, Golde	Payroll Manager	Complete	Complete	Complete	Complete	Action Needed				Review in Progress	<Select>	
22658	McGuen, Nancy E	Human Resources Assistant	Complete	Complete	Complete	Complete	Action Needed				Review in Progress	<Select>	

There also is one more step before the employee can see the manager comments, and that is on the bottom of the summary tab. The manager will need to select the **“Finalize and Share”** link below. Once this is done, the bar in the share column will move to green.



Once the meeting with the manager and employee is completed, the employee will then select the "Finalize and Share Review" link below and the process will be complete. And the employees name will replace the link.



## 16. How do I run reports in the system?

To print the performance review please select the reports tab, and then the 2014 annual review link. This will allow for a pdf of the review to be opened or saved.



## DEVELOPMENT PLANNING

### 17. How can I develop my staff members?

Focus on the 70-20-10 rule. 70% of employee training and learning takes place on the job, with day-to-day work and responsibilities through stretch assignment, committee involvement, and strategic plan initiative team involvement. 20% of the learning comes from structured mentoring opportunities, and 10% comes from formalized training and classroom programs. In addition to this training approach, there are many development opportunities available on campus. Supervisors/Managers can encourage employees to participate in the Compass Professional Development program offerings.

**18. The annual performance review is completed—what now? How do we continue to have performance related dialogue throughout the year?**

Ideally, supervisors/managers would touch base with employees quarterly to discuss performance, goals, and objectives. With the University's many initiatives and moving at a faster pace, you may find that goals and objectives that were relevant during the initial performance conversation now need editing or updating. There are many tools and resources available on the HR Performance Management Website at <http://www.creighton.edu/hr/performancemanagement/index.php>.

**19. As a supervisor/manager, I would like to get more feedback about my employee's performance from the customers they service, how do I do this?**

If you are looking for more feedback regarding your employee's performance, you might consider sending a short email or creating a short survey and sending to your employee's customer(s) to get additional feedback. It's important that this information is not used as a standalone but in conjunction with the supervisor/manager feedback.

Questions can be directed to Creighton Human Resources department at email [humanresources@creighton.edu](mailto:humanresources@creighton.edu) or call 402-280-2709.