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Goals and Performance Evaluation Process

The University Support Staff and Unclassified Performance Review Form Sample can be found [here](#)

Goals and Performance Evaluation Process - Generally

Pittsburg State University values the importance of a Goal and Performance Evaluation process that meets the following goals and objectives:

1. Establish the process for continuous employee development.
2. Increase communication between the supervisor and employee about performance-related issues.
3. Familiarize the employee with how the employee's position is aligned with the unit's mission and strategic plan as well as the University's mission and strategic plan.
4. Provide a formal process to evaluate employee performance during the employee's probationary period, annually, and/or during special review periods.
5. Include the following components:
 - a. Line manager and employee establish position-specific or professional goals for the review period.
 - b. Line manager and employee assess the employee's goals.
 - c. Line manager evaluates overall employee performance during the review period with employee feedback and comments.
6. Provide information about employee performance to use when making decisions involving salary, merit salary increases, promotions and terminations.

Effective March 2018, employees and line managers will use the Goals and Performance Evaluation processes in GUS Cloud. See job aids on the [GUS HR Training Resources](#) under the category "Goals and Performance Evaluations."

Each Vice President and Division Head (President's division) is responsible for ensuring that the Goals and Performance Evaluation process is completed in a timely manner for USS and unclassified administrative and professional employees within the division or area.

Goals and Performance Evaluation Process Components

There are three (3) components to the Goals and Performance Evaluation Process:

- [Position Description](#): The position description describes the duties and responsibilities of the position as well as the competencies (knowledge, skills and abilities) and other characteristics that will be used to assess employee

performance during the review period. Position descriptions are found on GUS Classic.

- # To access position descriptions in GUS Classic:
- # Employees can access the Official Position Description for their position through GUS Classic (login to GUS Classic, then access "Payroll and Personnel Information," then "Electronic Position Description").
- # Line managers can access position descriptions for employees in their department through the "Payroll and Personnel Information" in GUS Classic (login to GUS Classic, then access "Payroll and Personnel Information," click on the position number, then click on "Attachments") or through the GUS Position Inventory (login to GUS Classic, then access "Hiring Process", click on the position number link, then click on "Attachments").
- Goals
 - # Line managers and employees may establish position-specific or professional goals to be assessed during the review period. Goals may be short-term or long-term. Goals may be assessed throughout the review period. Progress toward meeting goals is considered in determining the overall performance review rating for the review period. See below for more information on Goals.
- Performance Evaluation
 - # Line managers complete the GUS Cloud Performance Document at the end of the review period. Employees provide feedback and/or comments to the evaluation.

Goals

Goals established during the review period can be a very important component of the performance evaluation process. Setting goals and objectives for the review period is encouraged but not required. Goals that have been established should be added to the GUS Cloud Goals module.

Goals are generally one of the following types:

1. **Operational/Task goal:** A goal may clarify a job duty with more specific, measurable or qualitative criteria, e.g. "Answer each email within 1 working day." "Reconcile unit balances by close of business each day."
2. **Performance Improvement goal:** A goal may outline specific areas of improvement needed to achieve a rating of "Meets Expectations," e.g. "Improve timeliness by submitting financial report two days after transactions are posted." "No unauthorized absences in the next four weeks."
3. **Developmental goal:** A goal may outline specific ways to enhance job skills, e.g. "Improve working knowledge of Excel by attending a workshop within 60 days."
4. **Project goal:** A goal may define the desired outcome or milestones to achieve in a project, e.g. "Develop and implement on-line leave reporting system."
5. **Managerial goal:** A goal may emphasize specific managerial tasks or characteristics, e.g. "Monitor work assignments by weekly review of project status with staff."

The line manager should involve the employee in setting goals. It is important that the employee understand the goal and know what he/she needs to do to accomplish it.

New goals may be established at any time during the review period. Current goals may be modified during the review period provided that there is at least 30 calendar days before the end of the review period.

When it is time to assess each goal or at the end of the review period, whichever occurs first, the line manager will:

1. Assess the achievement of each goal in the GUS Cloud Goal module.
2. Meet with the employee to discuss the assessment.
3. Complete the Performance Document in the GUS Cloud Performance module at the end of the review period. Goals are considered in determining the overall Performance Evaluation rating for the review period.

Performance Evaluation Period

The review period for USS and unclassified administrative and professional employees starts with the first day of the pay period in the new fiscal year in June or the appointment date, whichever is later. The review period will end on the last day of the pay period of the fiscal year or the appointment end date, whichever is later.

New USS employees will have a probationary period that is generally 6 months but can be extended longer if needed. A GUS Cloud Performance Document will be completed by the line manager prior to the end of the probationary period.

A line manager may request a special review period for a shorter length of time by notifying HRS.

Overview of the Goals and Performance Evaluation Process:

1. At the beginning of each review period the line manager and employee meet to:
 - Review the employee's position description, including the duties and responsibilities of the position and the connection of how the position supports the unit's strategic plan. Use the instructions, above, under Goals and Performance Components to access the position description in GUS Classic.
 - If the position description needs to be updated, the line manager should follow the instructions on the Position Description form for uploading the revised form to GUS Classic and routing a paper copy for signatures. If the position description is updated, the line manager then reviews the updated position description with the employee as outlined prior.
 - Review the performance factors in the [Performance Evaluation SAMPLE](#) which will be used to evaluate the employee at the end of the review period. Note that the SAMPLE is used only for informational purposes. The actual performance evaluation is completed in GUS Cloud. Document needs to be switched (4-factor assessment).
 - Establish position-specific or professional goals, if needed, for the review period. Add the goals to the GUS Cloud Goals module. Note that goals can be established by the employee and/or line manager. Use the following job aids found on the GUS

HR Training Resources site (<http://www.pittstate.edu/office/hr/gus-cloud-training-resources.dot>):

- Goals will be assessed in the GUS Cloud Goals module as part of the Performance Evaluation during the review period and/or at the end of the review period.

2. During the review period, the line manager should provide regular feedback to the employee on work performance. Goals should be assessed in GUS Cloud in a timely manner. New goals may be set during the review period provided that there is at least 30 days before the end of the review period.

3. At the end of the review period, the line manager:

- Asks the employee to provide input for the review period, such as accomplishments or achievements and progress towards meeting goals. Employee input is optional but strongly encouraged.
- Assesses the goals that were set during the review period and not yet completed.
- Solicit feedback from others, as appropriate (e.g. 360 degree feedback).
- Completes the Performance Document in the GUS Cloud Performance module.
Use the following job aid found on the GUS HR Training Resources site (<http://www.pittstate.edu/office/hr/gus-cloud-training-resources.dot>):

To complete the Performance Document, the line manager will:

- Rate each performance factor and add comments where appropriate. Behavioral examples are required for a rating of "Needs Improvement" or "Unsatisfactory." Supervisors are encouraged to provide examples when the employee "Exceeds Expectations."
- Determine an overall performance rating for the review period considering the employee's accomplishments and achievements, progress towards goals, feedback from others, if used, and ratings of the performance factors.
- Add comments in the "Manager Comments" section.
- Submit the Performance Document and share the document with the employee.
- Meet with the employee to discuss the performance evaluation.

4. After the line manager shares the performance document, the employee provides feedback, if desired. The employee uses the following job aid found on the [GUS HR Training Resources](#)

Evaluation Appeal

Unclassified Employees:

- The employee has five (5) working days after the performance evaluation is shared to add comments.
- The employee may request a further review of their performance evaluation by the next level PSU line manager. To request further review, the employee must provide a written request (paper or email) to HRS (payroll@pittstate.edu) within 10 working days after the date the performance evaluation is shared. The next level PSU line

manager must complete the second review within twenty (20) working days of the request.

USS Employees:

- Probationary Employees- A probationary employee on an original appointment (i.e., a new hire) cannot appeal a review rating. However, an employee serving probation for any other reason shall have the same appeal rights as an employee with permanent status if the employee had permanent status in the prior position.
- Permanent Employees- An employee who receives a performance rating that is lower than the highest possible rating may appeal that rating if the employee has permanent status. An employee who is serving a probationary period due to promotion or a rehire on the basis of reinstatement may also appeal a performance rating.
- To start the appeal, the employee provides written notification to Human Resource Services (HRS), 204 Russ Hall, within 10 work days after the review is presented to the employee. Note that the five day work period for employee comments and 10 work day period to appeal the review run at the same time starting with the date the review is presented to the employee.
- The appropriate parties for PSU in a performance review appeal are the rater and reviewer.

(Refer to the USS Handbook on Evaluation Appeals for more details on the appeal process)

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