



EMPLOYEE PERFORMANCE EVALUATION AND DEVELOPMENT PLAN INSTRUCTIONS FOR SUPERVISORS

The University's performance evaluation program is a two-step process:

1. Employee completes a self-evaluation.
2. Supervisor completes a performance evaluation.

Note that there are different evaluations depending on the classification of the employee as follows:

Union (Local 153) Employees
Non-Exempt (Hourly) Employees – Non-Union*
Professional Administrative Staff (Exempt)*

***Note that faculty and student workers are not included in this review process.**

Step 1: Self-Evaluation: In preparation for conducting the performance evaluation, the supervisor will give the employee the Self Evaluation Form. Please be sure that you provide the correct form depending on the employee's classification (see above): the employee should be given approximately 2 weeks to complete this form, with a firm due date to return the completed self-assessment to the supervisor. It is important that self-assessments be conducted in an environment where employees feel free to express themselves and complete the form honestly, without any perceived supervisory control or intimidation. Employees must sign and date their self-evaluation form.

Step 2: Supervisor Prepares the Employee Performance Evaluation and Development Plan. The supervisor needs to read the self-assessment prepared by the employee to be aware of the employee's perspective. However, it is the supervisor's responsibility to prepare an accurate and justifiable assessment of the employee's job performance without bias. It is expected that a supervisor will not give unearned performance ratings to avoid conflict with an employee. The supervisors must be truthful when evaluating an employee's performance. "Sugar-coating" negative comments or "nit-picking" is unfair to the employee. It not only makes it difficult to coach or discipline the marginal employee in the future but also has the effect of not communicating to the employee what is expected of him/her so that he/she has a fair chance of improving. Employees deserve the truth about performance. Supervisors need to keep detailed, accurate and objective notes throughout the rating period so that they can refer to specifics when completing the evaluation form and during discussions with employees. The annual review is not a time to discuss new issues. A performance evaluation should be a continuous process with feedback at the time of any incident and notes made for use in the annual evaluation.

Step 3: Conduct a Performance Review Discussion. The supervisor and employee should meet to 1) review, discuss, and confirm each other's understanding of the Performance Factors and Rating Categories on the **Employee Performance Evaluation and Development Plan**; 2) recognize strengths and achievements; and 3) review status on areas needing improvement or recommendations for employee development. The supervisor should schedule a time and a place to conduct the performance evaluation with the employee so that there will be no interruptions. The supervisor needs to devote full attention to the employee and the evaluation process. A performance evaluation session should take 30 minutes to 1 hour.

Step 4: Finalize the Written Review. If, during the discussion with the employee, the supervisor decides to change any performance ratings, a final version of the form should be prepared, and the employee and supervisor should meet again to review the final form. Each party will need to sign and date it. The employee may also wish to add comments before both parties' sign. Thereafter, the Employee Performance Evaluation and Development Plans must be reviewed by the supervisor's supervisor for final approval before being sent to Human Resources. The signed Employee Performance Evaluation and Development Plan should be scanned and emailed to Human Resources at PerformanceReviews@fdu.edu with the signatures of the employee, supervisor, and supervisor's supervisor. The employee's signature on the evaluation form acknowledges that the employee has read the evaluation. It does not necessarily indicate agreement with the assessment.

Interim Performance Evaluation: While not required for all employees, there is an Interim Performance Evaluation Form that supervisors can choose to use with **non-union** employees for mentoring/coaching purposes, to review progress being made on goals, or to evaluate performance mid-way through the year or more frequently if needed. **It is, however, required that supervisors use this form and conduct formal mid-year performance evaluations for non-union employees with an overall performance rating of Fair or Unsatisfactory.** Continued Unsatisfactory performance at the time of the interim performance review will be grounds for disciplinary action and may lead to termination. Non-Union employees with an overall performance rating at Fair will be put on notice that the next 1-year performance appraisal must show an overall improvement to Good; no improvement will be grounds for disciplinary action that may lead to termination. **Supervisors are required to contact Abigail Goldman, Human Resources Manager, for guidance on the Interim Performance Evaluation process.**