Jacksonville State University
Performance Review Instructions
January - March Evaluation Meeting Dates

Purpose of Performance Reviews
Jacksonville State University (JSU) strives for continuous improvement as a learning-centered community committed to developing the ability to think critically, solve problems creatively and collaboratively, and communicate effectively. We should exhibit this mission in all we do and in all relationships. It is important that all employees understand how what they do each day contributes to the achievement of JSU’s goals in a manner demonstrating our values. While feedback is ongoing, it is important to have a face to face discussion each year that is captured in writing to ensure that individuals and managers have a common understanding of progress. The performance review is intended to be a fair and balanced assessment of an employee's performance. It is a time for supervisors and employees to give and receive feedback clarifying job duties, stating management's expectations, and set goals for the coming year. To accomplish a fair and balanced assessment, management must provide the employee an opportunity to express his/her opinions about the employment relationship.

Essential Elements of Performance Reviews

1. **Supervisor reviews the employee's job duties for evaluation (using their job description).** The purpose of this review is to identify the job duties to be evaluated. It is not intended to be a review of the job description for reclassification.

2. **Supervisor and employee discuss the performance review.** The performance review process must include one-on-one discussion between the supervisor and employee with both parties being full participants.

3. **Timeliness.** Staff performance reviews should cover the calendar year and should be submitted during the first quarter of the following year by April 1.

4. **Documentation.** The summary sheet and any required statements/documentation should be sent to the Office of Human Resources. Any additional documentation that either the supervisor or the employee wants included in the employee's permanent personnel file may also be included.
The Performance Review Summary Form

The Performance Review Summary Form is designed to record the results of the employee’s evaluation. During the performance review meeting with the employee, use the Performance Review Summary Form to record an overall evaluation in the areas of accomplishments; service and relationships; accountability and dependability; adaptability and flexibility; and decision making/problem solving.

Key Elements of Performance Review Summary

- **Accomplishments** – Evaluate the employee’s success in performing identified duties/areas of responsibilities. Use the job description or departmental goals & objectives to identify specific duties/areas of responsibilities.
- **Service & Relationships** – Evaluate the employee's success in the areas of customer service, communication and interpersonal skills, diversity, student retention and teamwork.
- **Accountability & Dependability** – Evaluate the employee's success in contributing to the effectiveness of the department and the overall mission of the college. It is important to note that time off approved under FMLA may not be considered.
- **Adaptability & Flexibility** – Evaluate the employee's success in dealing effectively with additional responsibilities, learning innovative techniques and applying them to his/her job, and participating in appropriate training and development opportunities.
- **Decision Making & Problem Solving** – Evaluate the employee's success in making decisions, following safe work practices, and complying with college policies and federal, state and local laws. **If the employee performs a managerial function, evaluate the employee on his/her abilities to manage student complaints, human and fiscal resources effectively, developing goals which support the University's and unit's mission, and setting appropriate examples for employee behavior.**

Ratings

Expectations should be specific, measurable, attainable, realistic, and timely. An employee should be evaluated based on how well he/she has met the known expectations of his/her position. Each rating is assigned a corresponding numerical rating which should be averaged after completing the rating section.

Evaluate the employee using the following options:

- **Rarely Achieves Expectations - 1**
  Example: Employee rarely completes tasks on time or in a timely manner. **(This rating requires written, substantiated documentation).**
- **Sometimes Achieves Expectations – 2**
Example: Employee sometimes does/sometimes does not complete tasks on time and may often have to be reminded to complete the tasks.

- **Fully Achieves Expectations - 3**
  Example: Employee consistently completes tasks on time or in a timely manner with no intervention.

- **Consistently Exceeds Expectations – 4**
  Example: Employee completes tasks early or on time and will consistently seek ways to help others complete tasks and/or accept additional tasks. *(This rating requires written, substantiated documentation).*

**Completing the Summary Form**

Complete the Summary Form by indicating whether the following topics have been addressed during the review:

- Goals and Objectives
- Job Duties and Performance Expectations
- Employee Self-Assessment Form (Did employee complete?)
- Appropriate Corrective Action, if Necessary
- Comments from Supervisor and Employee

**Self Assessment Form**

Employees are encouraged to complete a self-assessment form prior to their performance evaluation meeting with their supervisor. The self-assessment form is an opportunity for employees to document their accomplishments, performance concerns and professional development activities for the given review period.

**Other Forms and Retention of Performance Review Form**

- If applicable, the Administrator/Peer Review Form
- Completed Performance Review, Goals & Objectives and Self-Assessment Forms will be kept in employees’ permanent personnel files.

If the employee disagrees with the evaluation, he/she must consult with their manager/supervisor first, if not resolved at that level the employee should address his/her concerns with the next level of management.

**Questions**

Questions about performance reviews may be forwarded to the Office of Human Resources. Attending a training session on how to conduct an effective performance review will be required for all managers and supervisors. All other employees will be trained on what a performance review entails.