2024 Staff Performance Evaluation Guide

PURPOSE

The performance evaluation process is one of the most important tools we have for recognizing and improving the contributions and skills of the individuals who make up our organization and planning for our future success.

The Board of Regents requires that the employee's immediate supervisor complete a performance evaluation form and conference annually from *January 1, 2024, through December 31, 2024,* except where performance requires more frequent review or when job responsibilities change substantially. This includes everyone except those employees who are still within their 180-day provisional work period or for whom provisional period evaluations have been completed since October 2024.

Completion of the performance evaluation process serves the following purposes:

1. To provide a consistent process University-wide.
2. To promote communication between employee and supervisor about the employee's work performance, policies, and practices within the unit which affect that performance, and means by which that performance might be enhanced.
3. To establish goals and expectations for the coming year.
4. To identify ways in which the employee can develop their skills and encourage such development.
5. To provide justification, along with other relevant information and the recommendation of the supervisor and Department/Unit Head, for potential pay rate increase, including merit, to be reviewed/approved by the Dean and University Human Resources.
6. To assist supervisors in determining the overall performance rating.

All supervisory personnel will be evaluated on their performance as supervisors, on administering the annual performance evaluation process, and on adherence to the University's non-discrimination policies.

UGA STAFF COMPETENCY MODEL AND UGA JOURNEYS

In May 2021, University Human Resources (UHR) introduced the UGA Staff Competency Model (SCM) to the University community. The effort to create this model was successful due to the engagement of many people across UGA from 2018-2021. This included over 6,000 staff members who participated in surveys and focus groups, an advisory group of human resources and financial officers from 50 administrative units, UGA's Organizational & Industrial Psychology Program, and our university leadership group. In 2021, UHR partnered with the Engage & Learn efforts to shift the organizational culture with a stronger emphasis on continuous learning and performance improvement for all staff.

At UGA, competencies are the foundation for the university's talent acquisition and management programs. Accordingly, the development and proficiency of competencies lead to:

Identification of critical selection criteria for candidates desiring employment at the University.
Creation of staff development and succession planning opportunities.
Development of customized training modules and identification of already available training programs.
Distribution of monetary awards through salary adjustments.

In September 2021, a Staff Performance Management Task Force was assembled and charged to develop a new performance management process for UGA Staff. The new performance evaluation form for 2024 is based on the Staff Competency Model's competencies, KSAOs, and supporting/non-supporting behaviors. To familiarize yourself with the 2024 performance evaluation process, you are encouraged to review the UGA Staff Competency Model resources located on the Engage & Learn website.

On September 13, 2023, University Human Resources announced the introduction of UGA Journeys via Archnews. UGA Journeys has been a multi-year project aiming to modernize career development for university staff and individuals who serve in supervisory roles. The new program which will be implemented in January 2025, provides a continuous career development model built to improve transparency, engagement, retention, and growth. Through professional development, career pathing, and other strategies, this program empowers UGA team members to pursue their professional goals more efficiently and effectively than ever before.

The Journeys program includes the following features and benefits:
- Clear career paths that are easy to understand so that staff can pursue the best paths for themselves.
- Professional development resources and opportunities that help grow staff in their current roles and better prepare them for future roles when opportunities arise.
- An enhanced performance management process and tool to encourage growth conversations around performance, based on the core competencies and leadership competencies from UGA's staff competency model.

At the University of Georgia, our greatest resource is our people. UGA Journeys aims to encourage our staff members' ambitions and provide them with pathways and resources to work toward their professional goals. This program helps ensure that UGA continues to attract and retain the best team members by investing in their futures.

UGA Staff Performance Management Process

University Human Resources is launching a new Staff Performance Management process in January 2025 through the Professional Education Portal (PEP). This approach is designed to improve the consistency, transparency, and overall quality of evaluations across the institution. This process aligns with the UGA Staff Competency Model introduced in 2019 and includes optional features for goal-tracking and skills enhancement to support employees' career growth.

Key updates and changes include:

- **Evaluation Scope:** Evaluations will be automatically assigned to supervisors for all full-time and part-time staff, postdoctoral associates, and administrative faculty. Temporary staff, student workers, graduate students, and regular faculty are excluded from this process. To check your supervisor and direct reports in PEP, [click here](). If this is not accurate, please contact the college's Human Resources Manager, Jason Jones, to update the "reports to" information in UGA's HR systems.

- **Required Staff Training:** All staff must complete the "[Intro to UGA's New Performance Process]()" training before December 15th, to be able to access their evaluations in PEP. This course explains the new evaluation criteria, rating scale, and process changes.

- **Supervisor Training:** Supervisors can also access the PEP course "[Performance Evaluation Refresher for Supervisors]()," which highlights the essential information necessary to complete a performance evaluation in PEP.

- **Evaluation Criteria:** Evaluations will be based on the knowledge, skills, abilities, and other characteristics outlined in [UGA's Staff Competency Model](). To see how these competencies translate into evaluation criteria and ratings, visit the [How Will I Be Evaluated webpage](). Note that there are additional evaluation criteria for supervisors based on leadership competencies.

- **New Rating Scale:** A target score of '3' now corresponds to Consistently Delivers. This rating shift allows for clearer differentiation of performance above or below job expectations.

- **Post-Evaluation Training Recommendations:** Based on evaluation scores, Learning & Development has aligned training courses with the Staff Competency Model to support employees' performance improvement and professional development. UGA has access to several high-quality training resources to promote career development.

- **Evaluation Access Control:** Once an evaluation is completed, it is not immediately available to the employee. The college has elected to have a 2-step evaluation release process where both the manager and the indirect manager (manager's manager) must complete a final review step (Step #3 on the Manager Performance Dashboard), to release the evaluation to the employee.

- **March 31, 2025 Deadline:** All evaluations must be completed by March 31, 2025. After this deadline, managers will lose access to evaluations, and the college's HR Manager will need to contact the PEP Help Desk for assistance.

For hands-on training on the new evaluation process, supervisors can register for "UGA Journeys: Get to Know the New Performance Tool," available in-person or via Zoom until December 2024. For additional

information about the new Performance Management process, please visit the Journeys [website](#) or email [journeys@uga.edu](#). If you experience any issues with registration, contact the PEP Help Desk at [pep.uga.edu](#).

The performance evaluation process begins at the time of hire or the beginning of the evaluation cycle from January 1, 2024, to December 31, 2024. Each employee's position description and the UGA Staff Competency Model is the source of job responsibilities and work standards upon which the formal performance evaluation is based. The supervisor should meet with all employees to review their detailed position descriptions and job-related expectations.

1. The supervisor completes the performance evaluation form in PEP making sure to review the employee's position description and review the PROPOSED evaluation with their supervisor before submitting the form. The supervisor <u>does</u> have the option to print the proposed evaluation to review with their supervisor. The purpose of the supervisor's supervisor review is to ensure there is sufficient detail in all categories (e.g., justification of ratings, comments made for the ratings, etc.) and to discuss items that may need to be reflected/removed on the evaluation form.
    a. *NOTE: Supervisors should complete the PEP course "[Performance Evaluation Refresher for Supervisors](#)," which highlights the essential information necessary to complete a performance evaluation in PEP.*
2. Upon completion (and after the supervisor's supervisor has reviewed the proposed evaluation), the supervisor should arrange either a face-to-face or Zoom meeting with the employee to discuss the employee's evaluation. The supervisor should encourage active discussion during the meeting.
3. During the meeting, Supervisors should discuss, at minimum, the following areas with the employee being evaluated:
    a. The breakdown of the areas scored
    b. Strengths
    c. Development Areas
    d. Recommended Actions
    e. Review the position description with the employee

        i. The supervisor and employee should make note of any changes to the position description which may formulate the basis for a potential review of the position description through the UGA HR Evaluate Process.

        ii. If a supervisor feels an update to the position description is warranted, they should speak with their Department/Unit Head to discuss a formal review of the position description.

        iii. If the Department/Unit Head agrees an update is necessary, they should speak with the Dean for consideration.

        iv. If the Dean agrees an update is necessary, the supervisor and/or Department/Unit Head should partner with the Human Resources Manager to complete and submit a [Position Evaluation Proposal](#) for consideration.
4. The supervisor then submits the performance evaluation form in PEP which will route to their supervisor for review/approval.
    a. *NOTE: The supervisor submitting the form in PEP is the "point of no return." If the evaluation needs to be rolled back to the supervisor for any reason after it has been submitted, the supervisor will need to contact [pep@uga.edu](#) for assistance.*
5. Once the supervisor's supervisor reviews and approves the evaluation, it will be released to the employee's Snapshot in PEP for review.
    a. *NOTE: All staff must complete the "[Intro to UGA's New Performance Process](#)" training before December 15th, to be able to access their evaluations in PEP. This course explains the new evaluation criteria, rating scale, and process changes.*

6. Once the evaluation has been released, the employee will receive an email with a link to review the evaluation. Through the link, the employee will have an opportunity to provide any feedback on their performance evaluation and attach any documents they feel might be relevant to their evaluation. Once they complete that step, the evaluation will be housed in the employee's PEP Snapshoot.
7. In the PEP Snapshot, Professional Development Plans can also be created for yourself or any of your direct reports. For more information regarding development plans, please view the PEP course titled Professional Development Plans.