



## 2023 Staff Performance Evaluation Guide

### PURPOSE

The performance evaluation process is one of the most important tools we have to recognize and improve the contributions and skills of the individuals who make up our organization and to plan for our future success.

The Board of Regents requires that a performance evaluation form and conference be completed by the employee's immediate supervisor annually for the period from *January 1, 2023 through December 31, 2023* 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, 2023.

Completion of the performance evaluation process serves the following purposes:

1. To provide a consistent process College-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 for encouraging 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.

## ANNUAL PERFORMANCE EVALUATION PROCESS

The performance evaluation process begins at the time of hire or the beginning of the evaluation cycle from *January 1, 2023 to December 31, 2023*. Each employee's position description is the source of job responsibilities and work standards upon which the formal performance evaluation is based. The supervisor meets with all employees to review their detailed position description and job-related expectations.

1. The supervisor prepares the [performance evaluation form](#), making sure beforehand to review the employee's position description. Guidelines to assist the supervisor in completing this form can be found below.
2. **Upon completion, the supervisor forwards the performance evaluation form to the employee to complete the appropriate employee sections. Supervisors should instruct employees to comment on the following during the evaluation process:**
  - a. **Section IV:**
    - **Identify performance areas they can improve upon.**
    - **Identify personal development goals/objectives.**
  - b. **Section V:**
    - **Indicate participation in any professional development opportunities or staff awards received.**
    - **Identify any key positions held in the organization, in working groups, and/or on committees.**
3. The supervisor arranges either a face-to-face or Zoom meeting with the employee to discuss the employee's comments, performance responsibilities, what is expected of the employee, and the performance ratings listed on the performance evaluation form. The supervisor should encourage active discussion during the meeting.
4. During this meeting, the supervisor and employee should make note of any changes to the position description which may formulate the basis for a potential review of position description through the UGA HR Evaluate Process.
  - a. 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.
  - b. If the Department/Unit Head agrees an update is necessary, they should speak with the Dean for consideration.
  - c. 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.
5. Supervisor makes final comments, completes ratings, and completes the evaluation.
6. At the end of this meeting, the evaluation form is signed by the employee and the employee's supervisor. An employee's signature does not reflect agreement with the assessment; it means only that the employee was given the opportunity to discuss the official review with the supervisor.
7. Following the evaluation conference, the signed evaluation form is forwarded to [Jessica Hart](#) for inclusion in the employee's personnel file. **DUE DATE TO OBA is Friday, MARCH 29, 2024.**

Copies of signed performance evaluation forms for each year of employment are filed in each employee's official personnel folder. As with all University and College records, all employee evaluation forms are subject to request under the Georgia Open Records Act.

## EXAMPLES: PERFORMANCE EVALUATION WORK STANDARDS

Job Responsibilities should explain both job duties as well as the purpose of the work and what it accomplishes. A job statement should involve three elements: 1) an action verb, 2) what the action produces, 3) and how it is performed.

### EXAMPLES:

- Fills vacant positions **by** recruiting through newspaper ads and placement agencies, and interviewing and testing candidates.
- Provides secretarial services **by** typing correspondence, procedures, interoffice memos, and announcements.

Work Standards are the statement of the effect made when the job results are accomplished as expected. It should *not* describe behavior but rather tangible accomplishments, such as quantity, frequency, time, cost, quality, and speed. Be specific in identifying expectations.

### EXAMPLES:

- **Job responsibility/result:** Provides information and direction by greeting staff, patrons, or guests in person or by multi-line telephone and providing information pertaining to organizational procedures and policies and/or routing them to the appropriate personnel.
- **Work standard (start with a noun):** Staff, patrons, and guests are greeted, assisted, and directed in a manner which promotes a positive and professional image of the Administrative Offices, the College, and the University.
- **Job responsibility/result:** Maintains flexibility and awareness of changes and needs in the office and organization by assuming similar duties and responsibilities as assigned.
- **Work standard (start with a noun):** Duties which are similar in level and in nature to the specific duties listed above are assumed as assigned with a willing attitude and helpful demeanor.

## EXAMPLES: PERFORMANCE EVALUATION PERFORMANCE RATINGS

The University utilizes four different rating levels as measures of performance: *Exceeds Requirements*, *Meets Requirements*, *Needs Improvement*, and *Unsatisfactory*. The chart below is meant to define each rating level and to provide some examples of the work standards which meets each requirement. Please feel free to work outside of these examples, as they are being provided for guidance.

<p><b>EXCEEDS REQUIREMENTS</b></p> <p>The employee's performance regularly exceeds the work requirements in quality, quantity, and timeliness. The employee demonstrates a desire and ability to excel in performance. Employees rated at this level demonstrate most of the characteristics described in the illustrative examples. The individual assumes a very high level of responsibility for their own performance, contributes to the articulation and definition of new programs or services, and stands as a model for other staff. Outcomes are of such quality they occur among only a small number of employees.</p>	<ul style="list-style-type: none"> <li>• Often volunteers for or accepts extra work/responsibility while maintaining strong job performance</li> <li>• Often exceeds quotas or production standards</li> <li>• Designs new techniques as requested, considering the concerns and suggestions of others</li> <li>• Suggests new policies or procedures when prompted</li> <li>• Maintains a positive and professional manner, even when under pressure; willingly accepts constructive criticism</li> <li>• Juggles multiple priorities and tasks, and /or user requests</li> <li>• Adapts to changing situations; maintains a positive attitude</li> <li>• Demonstrates a commitment to service over time, thus representing the College in a positive manner through leadership roles such as committee member, chair, or working group member</li> <li>• Communicates clearly; able to persuade others through effective communication</li> <li>• Serves as a model for others; recognized for areas of expertise</li> </ul>
<p><b>MEETS REQUIREMENTS</b></p> <p>Employees rated at this level regularly meet and occasionally exceed expectations. A rating at this level indicates the employee is a competent, productive, and valued member of the team. A fully successful employee consistently meets expectations within specified time and cost limits, understands and supports college-wide goals and priorities, contributes innovative and creative approaches to meeting and furthering achievement of the College of Pharmacy's mission. Employees rated at this level demonstrate most of the characteristics described in the illustrative examples.</p>	<ul style="list-style-type: none"> <li>• Produces the quality of work to meet and occasionally exceed job expectations</li> <li>• Applies logic and reason successfully when making decisions; makes infrequent errors due to oversight and/or misunderstanding</li> <li>• Applies appropriate judgment in responding to and referring questions or resolving problems</li> <li>• Willingly implements new techniques, considering concerns and suggestions of others</li> <li>• Accepts constructive criticism</li> <li>• Is a good listener; provides appropriate information to others; assists others with projects when asked</li> <li>• Minimizes wasted time or downtime; continuously tries to improve work performance</li> <li>• Maintains up-to-date knowledge of relevant procedures and functions</li> <li>• Readily accepts a change once the team decides to move in a direction</li> <li>• Promotes/supports department, colleagues, supervisors, the College, and the University in action and in words</li> <li>• Adheres to time and attendance rules</li> </ul>
<p><b>NEEDS IMPROVEMENT</b></p>	<ul style="list-style-type: none"> <li>• Performs in an unreliable or inconsistent manner when</li> </ul>

<p>Employees who do not regularly meet overall expectations or who regularly meet or exceed job performance expectations in some areas, but do not regularly meet expectations in other performance areas. The employee has demonstrated some willingness or ability to improve performance and resolve deficiencies which are less than satisfactory and which require steps be taken to improve performance. Employees in this category need improvement to reach the fully successful level. When performance is at this level, corrective action is warranted. For more information, speak with your Human Resource Manager and learn about these resources on the <a href="#">UGA Performance Management website</a>.</p>	<p>completing work; fails to complete tasks without frequent reminders; often goes beyond the expected time frame to complete assigned tasks</p> <ul style="list-style-type: none"> <li>• Often looks for reason why assignments cannot be accomplished rather than figuring out how to complete work</li> <li>• Requires considerable supervisory monitoring, consultation, and modification to implement goals and priorities in a timely and/or effective manner</li> <li>• Fails to anticipate or respond effectively to crises, obstacles, and/or changes in program direction</li> <li>• Does not make meaningful contributions to solving problems</li> <li>• Rejects new ideas without due consideration</li> <li>• Talks and/or behaves abrasively and/or offensively; exhibits discourteous or disruptive behavior</li> <li>• Fails to adhere to time and attendance rules</li> </ul>
<p><b>UNSATISFACTORY</b> Employees at this level clearly and consistently fail to meet all or most significant job expectations. The employee shows either unwillingness or an inability to improve. When performance is at this level, disciplinary action will be taken. For more information, speak with your Human Resource Manager and learn about these resources in the <a href="#">UGA Performance Management website</a>.</p>	<ul style="list-style-type: none"> <li>• Purposefully defiant</li> <li>• Habitually negligent in carrying out responsibilities</li> <li>• Habitually misuses telephone and/or computer resources</li> <li>• Purposefully wastes materials; damages equipment or property</li> <li>• Requires substantial supervisory monitoring, consultation, and modification to implement goals and priorities in a timely and/or effective manner</li> <li>• Unwilling or unable to respond to crises, obstacles, and/or changes in program direction</li> <li>• Often fails to recognize and identify routine problems</li> <li>• Habitually absent, tardy, or sleeps on the job; knowingly fails to report an absence</li> </ul>

## PREPARATION FOR FUTURE PERFORMANCE EVALUATIONS

In May of 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 stronger emphasis on continuous learning and performance improvement for all staff.

At UGA, competencies will become the foundation for the university's talent acquisition and management programs. Accordingly, development and proficiency of competencies leads 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 of 2021, a Staff Performance Management Task Force was assembled and charged to develop a new performance management process for UGA Staff. Although the new performance evaluation form for 2024 is still under development, we know it will be based on the Staff Competency Model's competencies, KSAOs, and supporting/non-supporting behaviors. In preparation for the 2024 performance evaluation process, you are encouraged to review and become familiar with 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 is a multi-year project aiming to modernize career development for University staff and individuals who serve in supervisory roles. When this new program is implemented in January 2025, it will provide a continuous career development model built to improve transparency, engagement, retention, and growth. Through professional development, career pathing, and other strategies, this program will empower UGA team members to pursue their professional goals more efficiently and effectively than ever before.

The Journeys program will include 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](#).

University Human Resources is working closely with HR liaisons in every school, college, and unit to ensure the successful implementation of this program university-wide.

The UGA Journeys executive sponsors include President Jere W. Morehead, Senior Vice President for Academic Affairs and Provost Jack Hu, Vice President for Finance and Administration Ryan Nesbit, and myself. The project sponsors are James Shore, Senior Associate Vice President for Finance and Administration, and Tamara Freeman, Deputy Director for Human Resources.

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 will help ensure that UGA continues to attract and retain the best team members by investing in their futures.

More information, including a timeline and FAQs, can be found at [hr.uga.edu/journeys](https://hr.uga.edu/journeys). If you have questions, please contact [journeys@uga.edu](mailto:journeys@uga.edu).