MEMO

To: Faculty and Staff
From: Sara Ermeti, Director, Human Resources
Subject: Annual Employee Evaluation Form
Date: November 17, 2008

Greetings!

It’s that time of year that we begin reviewing employee performance for the previous review period, in this case, we are looking at the period from December 1, 2007 - November 30, 2008.

As many of you may recall our campus went for years with nothing in place to formally evaluate employee performance. Approximately five (5) years ago our campus created the current form that is used and while it is a sound evaluation tool, we recognize that we are ready for growth and evolution with this format. Over the past ten (10) months we have been speaking with supervisors and staff alike on the needs they have for individual evaluations and have devised a new format that we believe will allow for enhanced employee involvement, team development and a more personalized performance review plan.

This new format has been reviewed by several focus groups on campus and their feedback has been included in the design.

The new annual employee evaluation form (attached) provides an opportunity for employees to become engaged in the evaluation process and will increase communication between supervisor and employee and allows for both to develop goals that are meaningful to each employee and their respective position on campus. We have also provided a section for team goals.

While we acknowledge that this new format is a significant departure from the tried and true employee evaluation design, it is one that will evolve over time and is viewed as a positive tool for employee’s personal development, communication with their supervisor, and for accomplishing the strategies and priorities of the university.

By discussing performance objectives and their measurements at the beginning of the review cycle a more objective evaluation will be created. This forethought will also prevent any surprises for the employee or the supervisor at the year-end evaluation.

Supervisors are expected to engage in performance management efforts with all staff employees. Sound administrative and management theories advocate performance management as a tool to improve employee performance and morale, and, ultimately, organizational outcomes. It is a philosophy which values and encourages staff development through a coaching style of management.
What are the benefits for Supervisors?

- Use of a fair, consistent process for all employees.
- Communication of expectations and accountability measures.
- Address performance issues as they occur.
- Track and assist progress.
- No surprises or uncomfortable situations at year end evaluation.
- Increased employee satisfaction and productivity.
- Provide employees with information about the university – mission, vision, policies, etc.
- Give university information about employee needs.
- Show employee how the job contributes to the university.
- Allows for redefining the plan throughout the year to reflect changes in resources or priorities.
- Shapes the environment for effective communication and feedback.
- Communication at beginning of review cycle what results are expected and how to achieve them.
- Assess performance and provide coaching for further development.
- Guide appropriate performance improvement plans/discipline when necessary.

What are the benefits for Employees?

- Know expectations upfront.
- Makes work meaningful – job/department/university fit.
- Two-way communication with supervisor.
- Clearly mapped development plan.
- Clear objectives/goals.
- No surprises at year end evaluation.
- Understand IU South Bend’s mission, vision, values, policies, etc.
- Opportunity to tell supervisor (and IU South Bend) what you want from the job.
- Know how you contribute to the overall purpose of the institution and the division.
- Use resources that are available.
- Shape the environment for effective communication and feedback.
- Achieve outcomes and meet expectations.

To close out our review year, supervisors will have the option of completing the current form or draft a narrative summary of each employee’s past year performance which may include elements from the current form such as initiative, teamwork, interpersonal relationships, and performance management. Most certainly, supervisors will include in their narrative those job specific expectations that were defined for each employee in last year’s annual review.

Concurrently, supervisors will distribute the new format to each employee. The process will be for the employee to create a list of objectives and goals from their perspective with the supervisor doing the same. One week later both the supervisor and the employee will reconvene to compare both lists and to mutually agree on a final version. This final version will then become the working document that both the employee and supervisor will work from for the evaluation period.

If you should have questions regarding the narrative summary and/or the new format, please feel free to contact me directly.