**University Staff Senate 2021 – 2022**

**Spring 2022**

**Committee**:

Marissa Kouns (Chair), Rachel Tuck, Randy Sessions, Jessica Walles, Angela Linder (Executive Committee Representative), Sheryl Propst (HR Representative)

**Purpose**:

Meet to evaluate the annual Evaluation process, requirements, etc. that are completed for non-teaching employees and develop a list of recommendations to present to the full Senate for approval prior to submission to Human Resources.

**Description:**

The Ad-Hoc Annual Evaluations Committee was appointed in Fall 2021 by Senate President, Gabriel Fonseca. The committee was asked to review current Employee Annual Evaluations and develop recommendations for changes. The committee met bi-weekly through late Fall 2021 and early Spring 2022 to discuss and develop recommendations.

The committee focused on the following scope:

**(1)** Creating a more personal process

**(2)** Requirements for completion by employee and leader

**(3)** Consistency issues

**(4)** Timing

**(5)** Tied to job descriptions

**(6)** Accountability

**(7)** Connection to merit pay

The committee developed the following goals:

**(1)** Implement requirements for mandatory completion by employee and leader

**(2)** Accountability of Evaluations

**(3)** Set standard for consistency of reviews and make the evaluations specific to employee positions

**(4)** Make the process more engaging

**(5)** Identify the timing of evaluations

**(6)** Identify the reason for evaluations and what they would be used for

The recommendations will be presented to the University Staff Senate Committee on March 22, 2022.

# Committee Recommendations for Annual Evaluations

## Goal #1: Implement requirements for mandatory completion by employee and leader

* Add a required check box to all evaluations (employees and managers) to confirm that annual meetings have been set and/or completed.
	+ This would indicate that meetings are being held and scheduled. Also adds a reminder for accountability. Possible check boxes could say:
		- “I have met with my supervisor regarding my evaluation”
		- “I have not met with my supervisor regarding my evaluation”
* Host trainings for managers on how to lead a one-on-one
	+ Give examples of what a one-on-one should look like.
		- Should not be part of a team meeting or talk in the hallway.
		- One-on-one should be held monthly, unless there is a need to meet more frequently
		- Discuss and make goals
		- Positive and negative reviews

## Goal #2: Accountability of evaluations

* Require all negative reviews to confirm meetings have been held and discussed with employee at the time negative or unsatisfactory behavior is documented by supervisor
* Combine Employment Relationship Training with trainings on how to conduct one-on-one meetings, completing and understanding the evaluations, etc.
* Required manager training on the My Training platform
	+ One-time training for new supervisors
		- Expand training for supervisors that will provide in-depth information and instruction on how to review and complete annual evaluations
		- Provide examples of each level of ratings and competencies
		- Provide resources for assistance as needed.
	+ Annual Training for recurring supervisors
		- Brief evaluations training updates and instructions

## Goal #3: Set standard for consistency of reviews and specific to employee positions

* Change rating system to include a numerical value to ease understanding of reviews for managers and employees.
* Set expectation for review to be based on employee position and specific responsibilities as determined by supervisor.
	+ Set focus on completion of job responsibilities rather than behaviors – behaviors have more focus in Service Standards/Shocker PROUD
* Change competency explanations for ratings to have a better understanding and rating of employee’s actual work
* Add additional competencies:
	+ Communication
	+ Technical Skills
* Require director or budget officer to audit and sign off on reviews

## Goal #4: Make the process more engaging

* Require supervisors to have monthly meetings with employees to discuss progress, expectations, and goal progression.
	+ Set expectation of what a monthly meeting should look like and examples of what should be discussed.
	+ Set expectation of how annual evaluations and monthly meetings should be used
		- Expectation to not use as disciplinary or negatively, but as a tool to correct and improve performance. Disciplinary measures should not wait for monthly meetings or annual reviews.
		- Possibility of adding surveys that customers, students, and staff can complete to rate employee interactions.
			* Uploaded by supervisor prior to annual review.
* Possibility of additional review to be completed by employee to provide review of their supervisor.

## Goal #5 Identify the timing of evaluations

* Timing of evaluations is set to align with budget cycle and there may not be any flexibility to change this.
* Due to increased business in most offices during the month of January, recommend lengthening the time allowed to complete the self-evaluation by the employee from two weeks to one month.

## Goal #6: Identify the reason for evaluations and what they will be used for

* Provide incentives for meeting or exceeding expectations reviews:
	+ Merit Raises – percentage increase for meeting and/or exceeding expectations
		- In the case of a university wide increase, exceptions for an additional increase should be considered.
	+ Title Changes/Promotions
		- Working Title Updates to show growth in career based on performance
		- Job Title Changes – allow flexibility to grow and evolve positions that are taking on increased responsibilities with knowledge and expertise.
	+ Bonus possibilities for positive performance reviews
	+ Additional WSU Discretionary Time Off
* Enable evaluations to be accessible and available within the university for potential employment opportunities.
	+ Employee should be able to approve the evaluation to be shared with their application to applicable department.