



FLORIDA STATE UNIVERSITY  
OFFICE OF HUMAN RESOURCES

## HR Forum

# Performance Evaluations & Performance Management

January 24, 2019

# HR Updates

## Benefits

- Nine and 10-month faculty double deductions will begin with the February 1, 2019 paycheck.
- The Annual Retirement Seminar will be held on March 27, 2019. More information is coming soon.

## HR Updates

### Employee Recruitment Services

#### **Express Pool Hiring 101 (BTREC2-0001)**

- Learn how to use the OPS Express, GA Express, and Faculty OPS Express methods for hiring.
- When: Thursday, January 31, 2019, at 8:30 AM
- Where: Stadium Place - Training Center (L45), Computer Room 211

# HR Updates

## Equal Opportunity Compliance

- Due to an ongoing audit by the OFCCP, **the University is starting the Affirmative Action Plan cycle for the main campus on February 1, 2019.** Please make sure your department's personnel action records are up-to-date in OMNI HR.
- All personnel actions for Faculty, A&P, AEX, and USPS employees occurring on or before January 31, 2019, must be submitted to Human Resources no later than January 31, 2019. As a reminder, personnel actions include:
  - Hires
  - Rehires
  - Promotions
  - Reassignments
  - Transfers
  - Reclassifications
  - Demotions
  - Terminations
  - Any associated salary changes

# HR Updates

## Equal Opportunity Compliance

- If a personnel action occurring on or before January 31<sup>st</sup> will **not** be submitted to Human Resources by the January 31st deadline, please send an email to Vickie Robinson, [vrobinson@fsu.edu](mailto:vrobinson@fsu.edu), by January 30, 2019, which includes:
  - A description of the personnel action
  - The effective date of the action
  - The expected input date of the action
- Additionally, if a search firm was used to screen and hire an applicant between February 1, 2018 and January 31, 2019, please send an email to Vickie Robinson, [vrobinson@fsu.edu](mailto:vrobinson@fsu.edu), by January 30, 2019, which includes:
  - Position title
  - Name of individual hired for position
  - Hire date
  - Name of search firm
  - Name of contact person at search firm
- **Questions?** Contact Vickie Robinson at [vrobinson@fsu.edu](mailto:vrobinson@fsu.edu)

# HR Updates

## Attendance and Leave

- Sick Leave Pool Open Enrollment will run from February 4, 2019 – February 22, 2019. Applications received before or after the open enrollment window will not be accepted. Additional information as well as eligibility criteria will be sent out at the end of next week.
- Employees using the Elapsed Timesheet (A&P, Executive Service, Faculty) do not need to report a holiday. Please remind employees in your department of how time should be reported for the Martin Luther King Jr. holiday.

# Performance Evaluations & Performance Management

Julie Ritter

*Assistant Director*

Employee and Labor Relations

# Importance of Performance Evaluations

- Per Florida Statute 110.224, (2), each public employee must have a performance evaluation at least annually, and the employee must receive an oral and written assessment of his or her performance evaluation.
- It is the policy of Florida State University to communicate to Administrative and Professional (A&P) and University Support Personnel System (USPS) employee's job performance expectations and management's evaluation of the employee's job performance [4-OP-C-7-G1].
- A tool for supervisors to provide feedback to employees regarding performance expectations, deficiencies, and recognition for accomplishments.
- Provides documentation to support administrative actions, such as, promotions, salary increases, bonuses, and disciplinary actions.
- Evaluations are considered public records and may be accessed by a third party for review.



# Importance of Performance Evaluations

- All employees are required to be evaluated annually utilizing the ePerformance module in OMNI.
  - A&P Employees Annual Review Period: August 8, 2018 - August 7, 2019.
  - USPS Employees Annual Review Period: January 1, 2018 - December 31, 2018.
- Supervisors and Department Representatives are encouraged to utilize the training resources provided. Online training guides for the A&P and USPS ePerformance process can be found [here](#).
- Track completed evaluations and status updates by using the query:  
**FSU\_ELR\_EPERF\_STATUS\_DEPT**. To run the query, insert, **“Review Period End Date of 12/31/2018.”**

# Importance of Performance Evaluations

## A Bad Performance Review Meeting

# Importance of Performance Evaluations

- A&P and USPS Employees are rated on the following:
  - FSU Behavioral Expectations
  - Job Responsibilities
  - Competencies
  - Goals and Objectives (optional)
- Evaluations are:
  - Completed by Immediate Supervisor
  - Reviewed by Higher Level Supervisor (USPS employees only - when applicable)
  - Acknowledged systematically by employee



# Ratings

FSU Behavioral  
Expectations

- Above Satisfactory
- Satisfactory
- Below Satisfactory

Job Responsibilities

- Exemplary
- Above Satisfactory
- Satisfactory
- Below Satisfactory
- **Not Applicable**

Job Competencies

- None
- Basic
- Proficient
- Advanced
- Not Applicable

Overall Ratings

- Exemplary
- Above Satisfactory
- Satisfactory
- **Marginal Satisfactory**
- Below Satisfactory

# Performance Rating Guidelines

Rating	Behaviors Exhibited
<p><b>Below Satisfactory: “D’s and F’s”</b>-You are not doing the basics of what your position requires.</p>	<ul style="list-style-type: none"> <li>• Little or no contribution to organizational goals</li> <li>• Failure to meet work objectives</li> <li>• Inattention to organizational priorities &amp; admin requirements</li> <li>• Poor work habits resulting in missed deadlines</li> <li>• Incomplete work products</li> <li>• Strained work relationships</li> <li>• Failure to respond to customer needs</li> <li>• Lack or response to supervisor’s corrective efforts</li> </ul>
<p><b>Marginal Satisfactory: “C’s and D’s”</b> – Performance does not meet all of the job requirements. Periodically, performance is inconsistent and unacceptable in some areas.</p>	<p>Duties or Responsibilities are carried out in an inconsistent manner.</p>
<p><b>Satisfactory (You Know Your Business): “B’s and C’s”</b>- Performance against accountabilities which meets the requirements of the position. Your performance consistently fluctuates between commendable and adequate</p>	<p>You understand your position and continuously carry out the duties assigned to you.</p>
<p><b>Above Satisfactory: “A’s and B’s”</b>-Performance against accountabilities which always meets and sometimes exceeds the requirements of the position. Approaching the highest levels of standards set.</p>	<p>You know your business, you know your coworkers business and you help them when they need you.</p>
<p><b>Exemplary: “A+ and Extra Credit”</b>-Performance</p>	<p>You not only know your business, you know the department’s business, AND you generate or change our business.</p>

## Preparation for Evaluations

- Historical documents for employees can be located in **Manager Self-Service**, provided that the employee has the same supervisor. If another supervisor completed the employee's evaluation last year, please contact ELR for assistance with obtaining previous evaluations.
- Performance evaluations are not required for USPS employees who were hired or transferred to a USPS position on or after May 1, 2018. These employees will not have evaluations available in OMNI HR.

## Navigation in OMNI

- **Supervisor:** *myFSU > HR > Manager Self-Service > Performance Management > Team Performance > Current Documents*
- **Higher Level (Approval):** *myFSU > HR > Manager Self-Service > Performance Management > Approve Documents*
- [Online Training Materials](#)

## ePerformance Steps

1. Complete the document.
2. Select **“Submit for Approval”** for USPS evaluations only, when applicable.
3. Schedule and hold a performance evaluation meeting with the employee.
4. Make the document available to the employee by selecting the **“Share with Employee”** button and confirm the meeting was held by selecting the **“Request Acknowledgement”** button.
5. Employee acknowledges evaluation.
6. Complete the performance evaluation by selecting the **“Complete”** button.



## USPS Evaluations

- The evaluation is considered complete when:
  - There is an overall rating factor listed in the evaluation document.
  - The evaluation has been reviewed with the employee.
  - The employee has acknowledged the evaluation online and the rater has marked the evaluation document complete.
- Remember:
  - The supervisor is responsible for the timely completion of evaluations.
  - USPS Evaluations are due on March 1, 2019.



# Training and Resources

- Training sessions may be administered upon departmental request.
- Resources:
  - Quick Reference Guide
  - Higher Level Supervisor Guide
  - Employee Action Guide
  - Completing the [Performance Evaluation Guide](#)
- **Questions?** Contact ELR at (850) 644-6475

## Tool Box

- Probationary Extension
- Performance Expectations Plan
- Annual or Special Evaluation
- Disciplinary Action
- Performance Improvement Plan (required with a Below Satisfactory rating)
- Regular 1:1 meetings
- Require training
- Counseling memos

## Probationary Period

- An extension of the hiring process.
- Key opportunity to set expectations and begin discussing and documenting concerns.
- Scrutinize what a “new and learning” issue is compared to a “this is how it’s going to be” issue.
- Don’t make the assumption that things may get better; handle the situation as it is now.



## Pause and Consider

- Have you set the expectations?
- Have you given honest and open feedback?
- Has the employee received adequate training?
- Does the employee's performance evaluations reflect the employee's performance and behavioral concerns that you have discussed with them?
- Is the issue related to the job?

## Disciplinary Process

- The purpose of discipline is to correct employee behavior/actions or performance that have a negative impact on the individual, co-workers, department, or the University.
- **Supervisors issue disciplinary actions.** ELR investigates the matter, serves as a subject matter expert regarding policies and procedures, drafts the disciplinary action, and ensures actions are consistent with University guidelines.

## Tips to Remember

- Focus on job-related behavior and issues
- Be consistent
- Document and discuss
- Communicate and provide feedback – both good and bad
- Don't wait to handle performance or behavior issues
- When in doubt, call in an expert

## Contact & Resources

- Tracey Pearson, Director
- Julie Ritter, Assistant Director
- Kelly McLaughlin, HR Specialist
- Courtney Gogan, HR Specialist
- Justin Roumelis, HR Representative
- ELR Main Line 850-644-6475
- [HR website](#)



Questions?

# Up Next

February HR Forum:

***Ensuring Your Competitive Hiring Process is Audit Ready***

Thursday, February 14 (8:30 a.m. – 10:00 a.m.)

Training Center

# One-on-One Questions

<b>Section</b>	<b>Representative(s)</b>
Attendance & Leave	<b>Brandi Allen</b>
Benefits	<b>Linda Lieblong</b>
Compensation Services	<b>Lisa Rosenthal</b>
Diversity & Inclusion	<b>Michelle Douglas</b>
Employee & Labor Relations	<b>Tracey Pearson</b>
Employee Data Management	<b>Jonathan Banks</b>
Employment & Recruitment Services	<b>Lindsay Holzmacher</b>
Equal Opportunity & Compliance	<b>Tonya Edington</b>
Facilities HR	<b>Phillip McCullough</b>
Faculty Relations	<b>Danni Staats</b>
Housing HR	<b>Greg Turner</b>
Training & Organizational Development	<b>Janet Fryman</b>