



# Staff Annual Performance Evaluation

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## Your Success, Our Priority

At our institution, we believe that open communication and clear expectations are key to personal and professional success. The performance evaluation process is designed to celebrate achievements, provide constructive feedback, and help each employee thrive in their role.

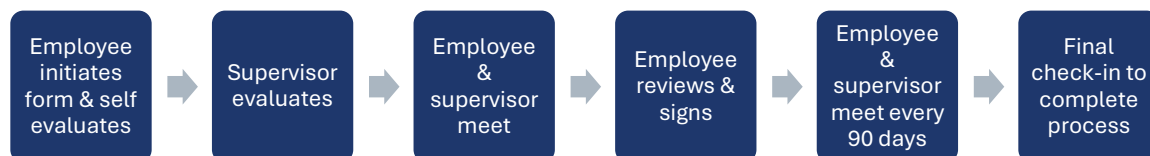
## Introduction

The performance evaluation process is an important opportunity for employees and managers to reflect on accomplishments, identify areas for growth, and set clear goals for the future. This document provides step-by-step guidance to ensure evaluations are completed accurately, consistently, and in alignment with institutional expectations. Following these instructions will help ensure that the process is fair, constructive, and supportive of professional development for all employees.

## Why This Matters

Performance evaluations are more than just a yearly requirement—they are a tool for fostering communication, recognizing contributions, and creating a shared understanding of expectations. When completed thoughtfully, they help employees feel valued, managers make informed decisions, and the organization maintain a culture of continuous improvement.

## Process




## Phase I

Phase I entails setting an agreed-upon baseline of competencies and goals for the upcoming year. During this phase, the supervisor and employee work together to identify the core skills, behaviors, and performance expectations that will serve as the foundation for the evaluation process. Clear goals are established to align the employees' contributions with institutional strategic initiatives.

This step is critical because it creates a shared understanding of what success looks like, provides measurable benchmarks for progress, and ensures fairness and consistency in how performance will be assessed. Documenting these expectations up front reduces ambiguity later in the year and helps both the employee and supervisor stay accountable.

It is important to note that all comments, goals, and competencies recorded in this section will be visible to all parties who view the evaluation. For this reason, comments should be written clearly, professionally, and with the understanding that they become part of the official performance record.

## Self-Evaluation



### Employee Evaluation & Goals

|   |   |  |
|---|---|--|
| Today's Date<br>September 25, 2025  | Faculty or Staff *<br><input type="radio"/> Faculty<br><input checked="" type="radio"/> Staff | Review Period *<br><input checked="" type="radio"/> Annual (July - September 15th)<br><input type="radio"/> 2nd Quarter (December)<br><input type="radio"/> 3rd Quarter (March)<br><input type="radio"/> 4th Quarter/Final (May) |
| Name  | Badge. ...  | Email  |
| Supervisor's Name *<br><div></div>  | Supervisor's Badger ID  | Supervisor's Email   |
| Supervisors' Supervisor's Name *<br><div></div>   | Supervisors' Supervisor's Badger Id   | Supervisors' Supervisor's Email  |
| Does the faculty/employee have management responsibilities? *<br><input type="radio"/> Yes<br><input checked="" type="radio"/> No |   | Job Title *<br>Taken from your latest LOA  |

## Employee Details

Employee completes the following fields:

**Faculty or Staff:** select the appropriate classification

**Review Period:** select 'Annual (July-September 15<sup>th</sup>)'

**Supervisor Name:** select the appropriate supervisor from the drop-down menu

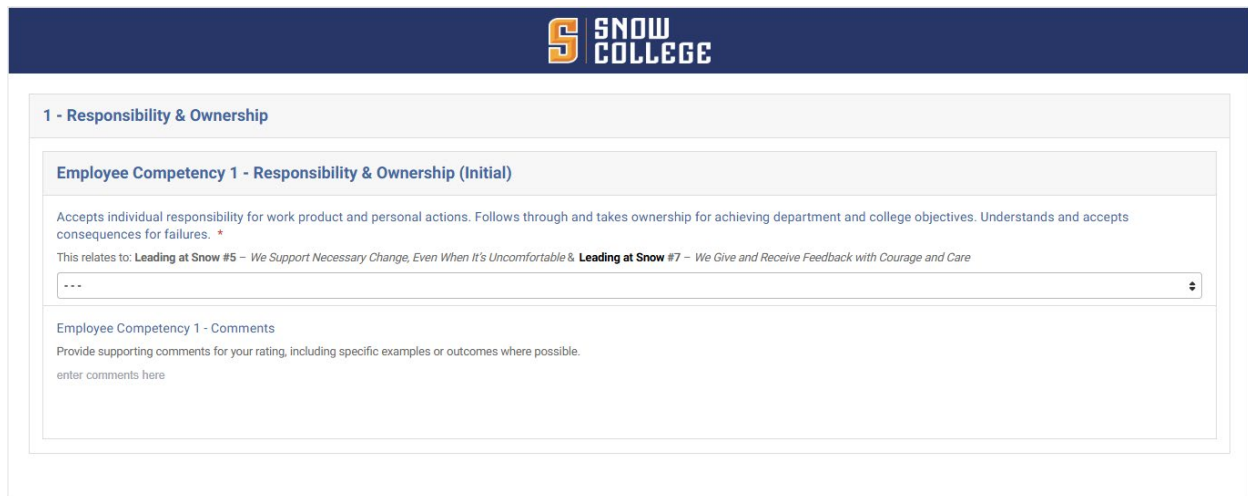
**Supervisor's Supervisor Name:** select the appropriate supervisor from the drop-down menu

**Management Responsibilities:** Select 'Yes' if the employee manages people and budgets

**Job Title:** Input the employee's job title

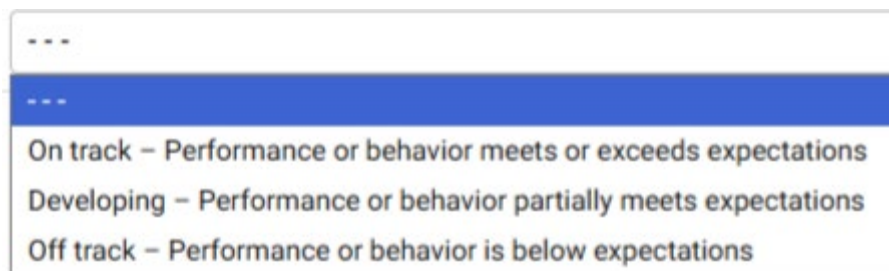
## Employee Competencies

All employees will self-evaluate themselves on five competencies.



The screenshot shows a web form for "Employee Competency 1 - Responsibility & Ownership (Initial)". At the top is the Snow College logo. Below it, the section title "1 - Responsibility & Ownership" is displayed. The main content area includes a description: "Accepts individual responsibility for work product and personal actions. Follows through and takes ownership for achieving department and college objectives. Understands and accepts consequences for failures. \*". Below the description is a dropdown menu with the text "This relates to: Leading at Snow #5 - We Support Necessary Change, Even When It's Uncomfortable & Leading at Snow #7 - We Give and Receive Feedback with Courage and Care". The dropdown is currently set to "...". At the bottom of the form is a text area labeled "Employee Competency 1 - Comments" with the instruction "Provide supporting comments for your rating, including specific examples or outcomes where possible." and a placeholder "enter comments here".

Employee competencies will be rated on a three-point scale.



The screenshot shows a dropdown menu for the rating scale. The menu is open, showing three options: "On track - Performance or behavior meets or exceeds expectations", "Developing - Performance or behavior partially meets expectations", and "Off track - Performance or behavior is below expectations". The "On track" option is currently selected and highlighted in blue.

Ratings of "On track" or "Developing" do not require comments. Ratings of "Off track" will require comments.

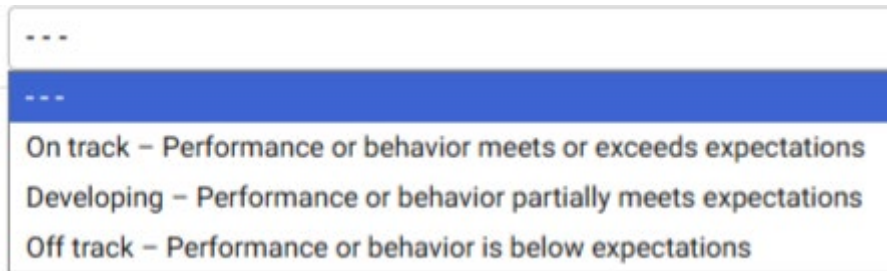
## Managerial Competencies

If the employee manages people or budgets, the employee should have selected 'Yes' on Management Responsibilities question on the Employee Details page.



The screenshot shows a web form for "Managerial Competency 1 - Conflict Resolution (Initial)". At the top is the Snow College logo. Below the title, there is a description: "Facilitates communication; Maintains impartiality; Applies negotiating skills; Prevents conflicts from escalating; Brings conflicts to resolution. \*". Underneath is a dropdown menu currently showing "...". Below the dropdown is a section titled "Managerial Competency 1 - Comments" with the instruction "Provide supporting comments for your rating, including specific examples or outcomes where possible." and a text area labeled "enter comments here".

Managerial competencies will be rated on the same three-point scale.




The screenshot shows a dropdown menu with three options. The first option is "...". The second option is "...". The third option is "On track – Performance or behavior meets or exceeds expectations". The fourth option is "Developing – Performance or behavior partially meets expectations". The fifth option is "Off track – Performance or behavior is below expectations".

Ratings of "On track" or "Developing" do not require comments. Ratings of "Off track" will require comments.

The employee will self-evaluate themselves on five managerial competencies.

## Goal Alignment with Strategic Initiatives



**Goals (Required)**

**Describe your SMART goals and identify the institutional Strategic Initiative they supports.**  
**Please provide two personal SMART goals that support one or more of Snow College's Strategic Initiatives.**

**Specific:** Linked to a job description, departmental goals/mission, and/or overall institutional goal. Answers the question--Who? and What?  
**Measurable:** The success toward meeting the goal can be measured. Answers the question--How?  
**Attainable:** Goals are realistic and can be achieved in a specific amount of time and are reasonable.  
**Relevant:** The goals are aligned with current tasks and projects and focus in one defined area; include the expected result.  
**Time Oriented:** Goals have a clearly defined time frame including a target or deadline date.

**Examples:**  
**Not a SMART goal:**  
Keep our department's website up-to-date. *Does not identify a measurement or time frame, nor identify why the improvement is needed or how it will be used.*  
**SMART goal:**  
The first Friday of every month, solicit updates and new materials from our department's managers for the web page; publish this new material to the website by 12:00 noon on the following Friday. Each time new material is published, review our department's website for material that is out of date, and delete or archive the outdated material.  
Ref: [SMART GOALS - TEMPLATE \(sandiego.edu\)](#)

**Goal #1**

Goal 1 - Snow College Strategic Initiatives \*

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Goal 1 - Describe your goal. \*

enter description here

Employees are required to describe two goals and align them with the College's Strategic Initiatives. A third, fourth, and fifth goal is optional.

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Ensure Positive and Sustainable Growth in ENROLLMENT, Retention, Completion, and Graduation  
Empower Students with Durable Skills and WORKFORCE READINESS  
Strengthen Institutional Capacity and OPERATIONAL EXCELLENCE

Once the required goals have been input, the employee will click the "Submit" button to complete the self-evaluation.

## Manager Tasks

After the employee submits the evaluation, the manager will receive a Kualu task via email.

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**Subject:** Your APPROVAL is requested: Employee Evaluation & Goals - Supervisor's Evaluation Approval

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Hello Tim,

Your attention is required

Form Name: **EMPLOYEE EVALUATION & GOALS**

Step Name: **SUPERVISOR'S EVALUATION APPROVAL**

Your Action: **APPROVAL**

[Begin Review](#)

This email was automatically generated.

The manager will begin their review of the employee evaluation. Each competency will require the supervisor to either “Agree” or “Disagree” with the employee’s rating and leave a comment if the supervisor disagrees with the employee’s evaluation.

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### Employee Competency #1 - Supervisor's Review

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Employee Competency #1 - Supervisor's Response \*

- ☐ Agree
- ☐ Disagree

---

Employee Competency #1 - Supervisor's Comments \*

enter comments here

---

Once all competencies and goals have been reviewed, the manager will sign the form and click “Approve” to move the form forward to the next step.



## Supervisor's Review

I acknowledge that I have reviewed the list of competencies presented in this form and believe they are in alignment with the institutional goals.

Supervisor's Signature \*

 Sign this form

Supervisor's Comments

enter comments here

The supervisor will then meet with the employee to discuss the evaluation. To complete this step, the supervisor will “Mark Complete” in the Kuali task.

## Employee Next Steps

To finish phase I of the evaluation, the employee will receive a Kuali task to do a final review of the evaluation. The employee should review the evaluations for any changes that were made during the meeting with the supervisor and sign the evaluation. They will then click “Approve” to complete the process and initiate final notifications.

The supervisor will then receive a PDF attachment in a Kuali email of the finalized evaluation, followed by the supervisor’s supervisor receiving the same notification and PDF.

## Phase II

Managers of staff will receive an automated email from Kuali and Argos during the months of December, March, and May reminding them to do the 90-day, 180-day and 270-day check-ins. At each check-in select the corresponding quarterly period option.

Review Period \*


- ☐ Annual (July - September 15th)
- ☐ 2nd Quarter (December)
- ☐ 3rd Quarter (March)
- ☐ 4th Quarter/Final (May)

## Quarter Reviews

Quarterly reviews will take place in December and March, with a final review in May. The supervisor will access the quarterly reviews using the task found in their Kuali action list.

| Action List   |            |              |                                       |              |  |
|---|------------|--------------|---------------------------------------|--------------|--|
| <div> <div>Q</div> <input type="text" value="Search"/> </div> |            |              |                                       | 1 - 4 of 4   | <div> <div>Prev</div> <div>Next</div> </div> |
| Document Type   | Document # | Submitted By | Workflow Step                         | Created On ↓ | Action Requested                             |
| Faculty/Employee Annual Evaluation & Goals                    | 0091       |              | Supervisor: 2nd Qtr Review (December) | Oct 3, 2025  | Task   |
|   | 0026       |              |                                       |              |  |
|   | 0138       |              |                                       |              | Approval                                     |
|   | 0033       |              |                                       |              | Task   |

Once back on the Employee Details page, the supervisor should select the appropriate review period. The supervisor can then review the employee competencies and goals before meeting with the employee and completing the quarter review.



2nd Quarter Review

2nd Quarter Review Response \*

☐ I have met with the Employee and reviewed their goals progress

2nd Quarter Review Meeting Date \*

MM/DD/YYYY

2nd Quarter Review Notes \*

enter notes from the review meeting here

**Quarter Review Response:** check the box confirming the meeting took place

**Quarter Review Meeting Date:** input date of meeting

**Quarter Review Notes:** input meeting notes

## Taking Notes During Quarterly Check-Ins

Quarterly check-ins are an opportunity to review progress, provide feedback, and ensure alignment with the goals and competencies established at the beginning of the evaluation cycle. To make the most of these conversations, supervisors should document discussions carefully and professionally.

## Review the Original Assessment

- Prior to the meeting, revisit the baseline goals and competencies that were agreed upon during Phase I.
- Use these as a reference point to guide the conversation and frame questions.

## Focus on What is Going Well

- Begin the discussion by highlighting areas of progress and accomplishments.
- Recognize strengths, achievements, and improvements since the last review.
- This helps reinforce positive behaviors and builds motivation.

### **Identify Opportunities for Growth**

- If challenges or barriers exist, discuss them openly and constructively.
- Emphasize problem-solving and support rather than criticism.
- Link areas of improvement back to the original goals to maintain consistency.

### **Record Notes Professionally**

- Summarize the key points of the discussion, including both strengths and opportunities.
- Use clear, objective language—avoid jargon, shorthand, or personal opinions.
- Keep notes concise but meaningful, focusing on observations and agreed-upon next steps.

### **Remember Visibility**

- All notes entered into the evaluation system are visible to the employee and other authorized reviewers.
- Write with the understanding that your comments form part of the employee's official performance record.
- Ensure tone is respectful, constructive, and professional at all times.

### **Confirm Understanding**

- Before closing the meeting, briefly recap what was discussed and confirm agreement on next steps.
- This helps avoid misunderstandings and ensures alignment moving forward.

## 4<sup>th</sup> Quarter Review

| Action List                                |            |              |   |              |   |
|--|------------|--------------|---|--------------|---|
| <input type="text" value="Search"/>        |            |              |   | 1 - 4 of 4   | <button>Prev</button> <button>Next</button> |
| Document Type                              | Document # | Submitted By | Workflow Step                                 | Created On ↓ | Action Requested                            |
| Faculty/Employee Annual Evaluation & Goals | 0091       |              | Employee: 4th Qtr/Final Self Evaluation (May) | Oct 3, 2025  | Task  |
|  | 0026       |              |   |              | Approval                                    |
|  | 0138       |              |   |              | Approval                                    |
|  | 0033       |              |   |              | Task  |

The fourth quarter review is initiated by the employee through a Kuali notification. This review has the employee looking back at the previous evaluation cycle and completing the self-evaluation again to gauge improvement and goal success.

After the employee submits the fourth quarter review, the form will then be reviewed by the employee's supervisor. This task is accessed through the Action List in Kuali.

| Action List                                |            |              |  |              |   |
|--|------------|--------------|--|--------------|---|
| <input type="text" value="Search"/>        |            |              |  | 1 - 4 of 4   | <button>Prev</button> <button>Next</button> |
| Document Type                              | Document # | Submitted By | Workflow Step                          | Created On ↓ | Action Requested                            |
| Faculty/Employee Annual Evaluation & Goals | 0091       |              | Supervisor: 4th Qtr/Final Review (May) | Oct 3, 2025  | Approval                                    |
|  | 0026       |              |  |              | Approval                                    |
|  | 0138       |              |  |              | Approval                                    |
|  | 0033       |              |  |              | Task  |

After the employee and supervisor meet, the supervisor approves and signs the final annual review.