Staff Annual Performance Evaluation

Contents

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.
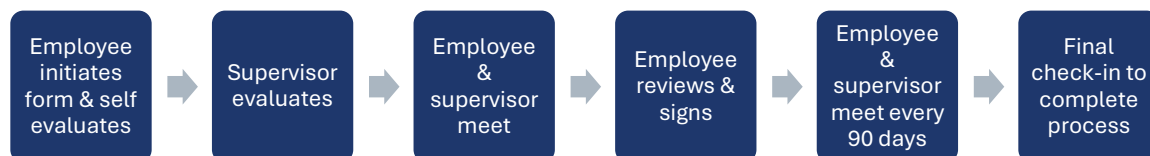
Introduction

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

Employee initiates form & self evaluates → Supervisor evaluates → Employee & supervisor meet → Employee reviews & signs → Employee & supervisor meet every 90 days → Final check-in to complete 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 Details

Employee completes the following fields:

Faculty or Staff: select the appropriate classification
Review Period: select 'Annual (July-September 15th)'
Supervisor Name: select the appropriate supervisor from the drop-down menu
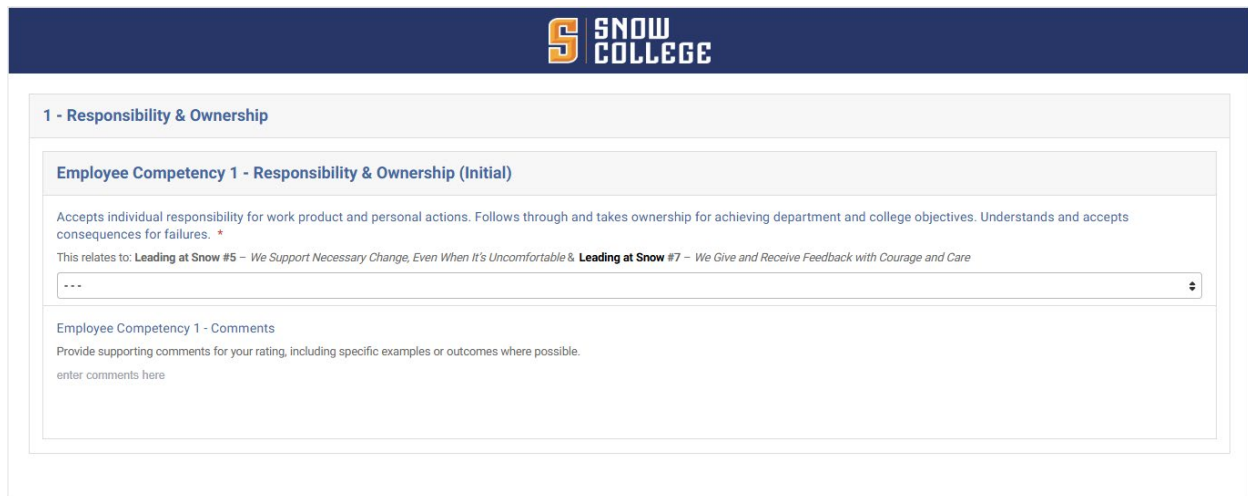
Supervisor's Supervisor Name: select the appropriate supervisor from the drop-down menu

Management Responsibilities: Select 'Yes' if the employee manages people and budgets
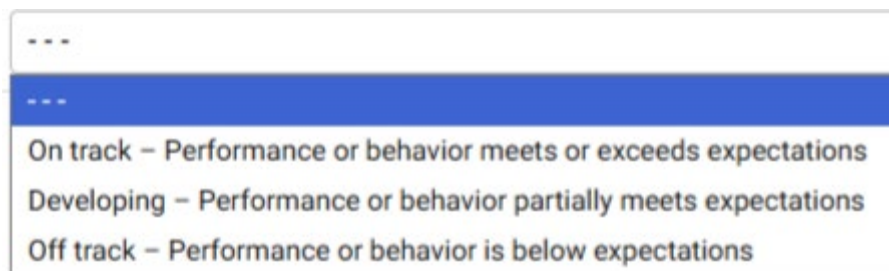
Job Title: Input the employee's job title

Employee Competencies

All employees will self-evaluate themselves on five competencies.

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

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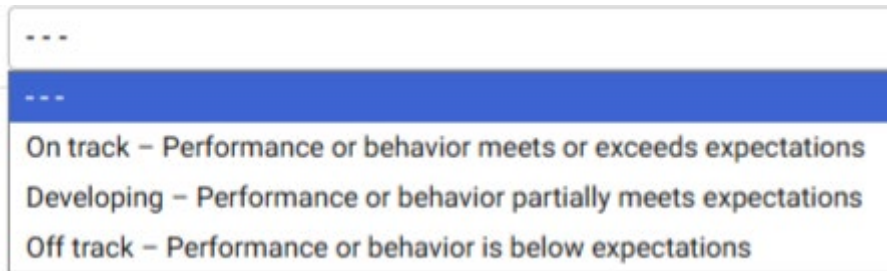
Managerial Competencies

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

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

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

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

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 Kuali task via email.

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.

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.

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.

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.

4th Quarter Review

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.

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