



**LOYOLA**  
UNIVERSITY MARYLAND

# **Staff and Administrator Performance Evaluation Project**

## **Information Sessions**

*Cayce Fournier, Director Compensation and HR Operations*

# Agenda

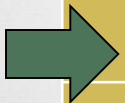
1. Project goals and timeline
2. Current state of performance evaluations
3. Stakeholder feedback
4. Limitations
5. Changes for 2020-2021
6. Phase II/future work

# Project Goals

- Incorporate the mission and values into the performance evaluation process
- Consider input from staff, administrators and Cabinet, related to the process and forms
- Put in place processes to ensure fairness and calibration of scoring
- Incorporate professional development planning and service conversations into the process
- Streamline the process wherever possible

# Timeline

Activity	Description
1	Review current processes, pain points and best practices
2	Obtain stakeholder feedback
3	Determine system capabilities
4	Develop recommendations and new forms
5	Discuss recommendations with leaders of those groups most impacted
6	Present recommendations to senior leadership and obtain feedback
7	Discuss project outcome with other stakeholders
8	Finalize last minute adjustments if needed
9	Share changes through meetings, education and online support materials
10	After action review and planning for continuous improvement



# Current state

- Ten annual evaluation forms
  - ✓ Several forms overlap with only minor differences
- Halogen system used for annual process
- Provisional evaluation is a manual process
- Annual period evaluated
  - ✓ March 1 through February 28
- 1-5 score rating scale
- Goals are scored at 50%, competencies at 50%
- Self-evaluation is optional at supervisor discretion
- No discussion on mission and values
- No professional development planning during the process

## Stakeholder feedback / Staff and administrators

- Timing is difficult
- Concerns about subjectivity and rating bias
- System is non-intuitive and not user friendly
- The job description should be part of the evaluation
- Feedback should be more frequent
- Perceived impossible to score 5 out of 5
- Offensive that supervisors copy and paste the employee self-evaluation comments into the supervisor comments
- Professional development planning is needed

## Stakeholder feedback / Supervisors

- Timing is difficult
- Appreciate seeing self-evaluations, but having to initiate them and find them is cumbersome
- Want simplicity; the system can be confusing
- Redundancy in the competencies leads to repetitive comments
- Difficulty creating goals for EVS, trades, etc.
- Suggest having cascading goals to feed the individual goals if possible
- Professional development planning is needed as part of the process

## Stakeholder feedback / Cabinet

- Integrate mission into the performance evaluation
- Inflexible scoring system
- Competencies are redundant
- Varying responses regarding timing of the due date
- Conversations should happen all year
- Add a space to facilitate professional development discussions
- System not intuitive
- Include self-evaluation into the form of record



# Limitations

- Current system  
Example: drop-down box of competencies is not a function Halogen can support for choosing competencies
- Changing the performance review schedule is an institutional decision. Varying recommendations indicate there is no good time

# Changes for 2020-2021

- Incorporate mission and values into the performance form as a non-rated section. Encourage employees and supervisors to consider and discuss activities performed or planned in support of mission and values
- Provide learning opportunities and toolkit for having conversations about mission, values and service opportunities

## Loyola Mission, Vision, and Values

<p><b>Our Mission:</b> Loyola University is a Jesuit Catholic university committed to the educational and spiritual traditions of the Society of Jesus and to the ideal of liberal education and development of the whole person. Accordingly, the University will inspire students to learn, lead and serve in a diverse and changing world.</p>	<p><b>Our Vision:</b> Loyola University Maryland, anchored in Baltimore, will be a leading national liberal arts University in the Jesuit, Catholic Tradition.</p>
<p><b>Academic excellence</b> – promotes a love for learning, discovery, and integration across a wide range of disciplines and interests.</p> <p><b>Focus on the whole person</b> – honors, cares for, and educates the whole person by encouraging constituents to strive after intellectual, physical, psychological, social and spiritual health and well-being.</p> <p><b>Integrity and Honesty</b> – integrity and honesty that is manifested in an atmosphere of open civil discourse and careful, respectful listening where freedom of thought and expression are valued and protected.</p> <p><b>Diversity</b> – encourages openness to new discoveries, ideas, methods, and perspectives and actively encourage and celebrate diversity in all forms.</p> <p><b>Community</b> – strives to define goals and values clearly so as to ensure unity of purpose and to encourage shared ownership for the University’s mission and vision.</p> <p><b>Justice</b> – strives to foster global awareness, as well as a sense of solidarity with and care for all who struggle for justice. In particular, the University strives to foster awareness and understanding of first-world privilege, and of its attendant responsibilities for leadership and for advocacy of social and structural change.</p>	<p><b>Service</b> – offers to all community members a rich variety of opportunities for solidarity and service both within and beyond the institution.</p> <p><b>Leadership</b> – identifies, develops, encourages, and rewards the exercise of gifts of leadership in all community members in all areas of their lives.</p> <p><b>Discernment</b> – encourages the practice of regular reflection and self-examination which foster awareness of the personal freedom (or lack thereof), a sense of personal responsibility for choices and actions, and a balance between enlightened self-interest and promotion of the common “greater” good.</p> <p><b>Constant Challenge to Improve</b> – strives for improvement on an ongoing basis by holding out an ideal of personal wholeness and integration as the ultimate horizon of growth, while simultaneously recognizing that development and growth require time and sustained effort. The University seeks to encourage its constituent members to think creatively and to challenge the status quo when appropriate. Loyola also seeks to foster habits of learning, inquiry, and personal and corporate self-examination that encourage ongoing growth and change in its members.</p>

Please provide specific examples of how Loyola’s Institutional values were exhibited in the work setting. Discuss strengths and opportunities for improvement. The employee should provide a self-assessment, indicating how they have given expression to Loyola’s mission through their work.

# Changes for 2020-2021

Add a section related to how well the employee performs their job as stated in the job description

## Job Description

Employee Score:

Supervisor Score:  / 5.0 (30%)

### Job Duties

Please rate the employee's job responsibilities for the review period. These should include the major responsibilities from the employee's position description and may occasionally include other responsibilities.

- Exceptional
- Exceeds Expectations
- Meets Expectations
- Below Expectations
- Needs Improvement



## Job Description Comments

Provide strengths and/or areas for improvement. Provide specific examples for a score graded above or below a "Meets Expectations" score. Include other comments as appropriate.

### Job Description Comments

Self: N/A



# Changes

## Combined the Self-Evaluation and Manager's Appraisal In One Document

Core Competencies		Employee Score: 4.4	Supervisor Score: 3.9 / 5.0 (50%)
<b>Job Skills</b>		(0%)	
<p>Possesses sufficient job skills and knowledge to perform the job in a competent manner. Is able to demonstrate skills and knowledge in day-to-day situations. This is distinctly different from those individuals who lack sufficient job skills or knowledge to meet job requirements or who have the skills and knowledge, yet struggle to apply them to day-to-day situations on the job.</p>			
<b>Manager</b>			<b>Self</b>
<input type="radio"/>	Has expert level skills and knowledge.		<input type="radio"/>
<input type="radio"/>	Has strong skills and knowledge.		<input checked="" type="radio"/>
<input type="radio"/>	Has sufficient skills and knowledge to perform the job competently.		<input type="radio"/>
<input checked="" type="radio"/>	Acquiring the skills and knowledge needed to perform the job competently. Will benefit from further training.		<input type="radio"/>
<input type="radio"/>	Does not possess the skills and knowledge needed to perform the job competently.		<input type="radio"/>
<input type="radio"/>	Not Applicable		<input type="radio"/>
<p><b>Self:</b> I continue to stay up to date on all current changes/trends. I am very knowledgeable in all areas within our department. I try to ensure proper procedures are in place and followed.</p>			
<p><b>Comments:</b> Jessica meets the basic skill set to perform her job at an adequate level. Her knowledge of industry standards are weak and shows in the work she presents. I believe Jessica has the drive to acquire the skills to make her a subject matter expert in her area, but she will need further training. She still has room for growth within her current position.</p>			

# Changes in 2020-2021

Collapse the number of forms from 10 to 3

## *Current forms:*

- Environmental Services Form – 52 individuals
- Event Services Form – 16 individuals
- Facilities Management Form – 16 individuals
- Grounds Crew Form – 12 individuals
- Non-Supervisor Form – 271 individuals
- Office Support Form – 45 individuals
- Printing and Mail Form – 4 individuals
- Parking and Transportation Form – 16 individuals
- Public Safety Form – 27 individuals
- Supervisors Form – 173 individuals

# Changes in 2020-2021

3 forms for 2020-2021. Remove “Goals” from the Operations form  
 Readjust the weighting for supervisor/non-supervisor forms

Supervisor	Non-Supervisor	Operations (Combined Form)
Mission and Values – not scored	Mission and Values – not scored	Mission and Values – not scored
Job Duties – 30%	Job Duties – 30%	Job Duties – 50%
Goals – 40%	Goals – 40%	Optional
Competencies – 30%	Competencies – 30%	Competencies – 50%

*HR met with department leaders for groups most affected by this change.*

# Changes for 2020-2021

- Collapse the number of competencies
  - 15 to 7 for non-supervisors
    - Cross cultural sensitivity
    - Productivity/Quality
    - Dependability
    - Relationship Building/Customer Focus
    - Communication
    - Initiative
    - Analytical Thinking
  - 15 to 11 for supervisors
    - Change Management
    - Creating a Challenging Environment
    - Teamwork
    - Managing Employee Performance



# Changes for 2020-2021

- Write one combined comment for all competencies

## Competencies Comments

Provide strengths and/or areas for improvement. Provide specific examples for all competencies graded above or below a "Meets Expectations" score. Include other comments as appropriate.

### Competencies Comments

**Self:** N/A



# Changes in 2020-2021

- Eliminate the required goal section for operations staff evaluations
- Add a professional development section to all evaluation forms (beyond goals) for professional, service and mission related activities
- Provide learning opportunities and toolkit for having conversations about mission, values and service opportunities and to assist employees with professional development planning

# Changes for 2020-2021

## Add A Step For Calibration of Ratings

- After the forms have been submitted to the 2nd level reviewer, the next step for calibration would be held in an HR queue
- HR will conduct analysis on the scores and communicate results to VPs for them to consider. Adjustment, if any, would be made prior to finalizing performance evaluations
- This will look for consistency and fairness in how scores are being distributed before the reviews are finalized

***Note: all employees and supervisors have to commit to completing reviews by the deadline dates to be able to do this.***

*Refer to sample calibration*

# Changes for 2020-2021

## Provisional evaluations

- On-line process open all year
- Short form 1-2 pages
  - Job Duties : “Meets” or “Does not meet”, add comments
  - Competencies: “Meets” or “Does not meet”, add comments
  - Overall score: “Meets” or “Does not meet”, add comments
  - Overall recommendation:
    - ✓ move to non-provisional status
    - ✓ extend provisional period and number of days
    - ✓ termination
- Goals for next review period
- Employee/Supervisor comments

# Addressing Concerns with Existing Tools

- Enhanced supervisor training both in person and online
- Performance management toolkit with best practices on how to have performance conversations
- Training and toolkit for career and professional development planning
- Training on utilizing additional features of Halogen

## Phase II/Future Work

- Any changes approved will be incorporated into the 2020-2021 performance year/forms
- For the transition, there will be two forms – one to close out 2019-2020, another for 2020-2021 (carrying goals forward)
- Review other systems in comparison to Halogen
- Learning and development for building personal and professional development plans
- Discussion with vice presidents about building career paths
- After action review at the end of the cycle
- This the beginning of continuous improvement of this process

Questions and Feedback?