Performance Evaluations Using CougarHR

Information for Experienced Supervisors
Who must be evaluated?

- All full-time staff employees
- New hires with start dates prior to April 1, 2012
  - Employees hired after April 1 will only receive a 90-day evaluation
  - Use CougarHR for 90-day evals
When is the evaluation due?

- All evaluations must be completely through the process by **JULY 31**
  - Creating the new evaluation in CougarHR
  - Documenting the Achievements
  - Completing the Assessment of all Goals, Performance Indicators, Discipline Actions
  - Meeting with the employee
  - Completing the signatures in CHR
Evaluation Phases

- **Phase I: Planning/Performance**
  - Enter Goals for 2011–2012
  - Enter Achievements

- **Phase II: Assessment**
  - Evaluate Goal completion
  - Evaluate each Performance Indicator
  - List any formal disciplinary actions

- **Phase III: Review**
  - Print the evaluation and make copy for meeting
  - Meet with the employee
  - Electronically sign evaluation; employee receives email with links
  - Employee signs evaluation in CougarHR
If you did not establish goals for this year, you do not enter anything in this section.

If you established goals but did not enter them in CougarHR, you should enter them now while in the Planning/Performance phase.

**SMART Goals:**
- Specific, Measurable, Achievable, Relevant, Time-based

Goals must be scored.
Performance Indicators

- All Staff Employees must be scored
  1. Essential Job Functions (now one group)
  2. Customer/Client Service
  3. Communications
  4. Decision Making/Problem Solving
  5. Initiative
  6. Balance of Quality and Quantity of Work
  7. Demonstration of Core Values
Performance Indicators

- Staff Supervisor Additional Indicators
  8. Effective Hiring
  9. Performance Management
  10. Teambuilding
  11. Delegation

- If employee does not supervise anyone, score these Not Applicable
- System requires you to score them
Discipline Actions

- This section must be rated
- Employees with no discipline actions will be scored Not Applicable
- All Level I and Level II discipline actions must be noted in this section of the evaluation
- Anyone with Level 1 or Level II warnings must be scored Does Not Meet Expectations in this section
- Coaching activity is NOT part of the formal disciplinary process and will not be listed here but could be cited in the relevant PI
Assessment Phase: Ratings

- Three options for each Goal, Performance Indicator, Overall ratings
  - Exceeds Expectations (3)
  - Meets Expectations (2)
  - Does Not Meet Expectations (1)

- Each rating is defined in CougarHR

- Each rating may be used if applicable, including Exceeds Expectations; employees should understand that Meets Expectations is not a poor rating

- Accomplishments are listed but are not rated

- Rating for Essential Job Functions is weighted more strongly than other Indicators

- A rating of Does Not Meet Expectations in Discipline will result in Overall rating of DNME
System calculates Overall rating; manager can override system rating (see QRG C.9)
One or more individual Indicators may be DNME but Overall may still be Meets Expectations
An **Overall** Rating of DNME must be reviewed first with HR, and documentation of problems and discussions with employees must exist
Overall rating of DMNE renders employee ineligible for salary increase
Any employee who received a Level 2 discipline action this year MUST receive an Overall rating of DNME (Board policy DLA)
Resources

- CougarHR system issues
  - Kari Kimbrough (x 3160); Sheri Eadie (x3158)
  - Quick Reference Guide
  - Help function in CougarHR

- Performance evaluation wording, goal setting or delivering message in meeting – campus HR Consultant
  - Sandy Davis (CPC, CHEC, Rockwall) x3164
  - Aniesha McClinton (PRC, CYC, Allen) x3857
  - Tonya Wogberg (SCC) x3856