



ST. JOHN'S
UNIVERSITY

Performance Management Training for Employees

2022

Presenter: Eileen Caufield, HR

- Evaluating performance via the RED form
 - Objectives
 - Competencies
 - Professional Development
- Using Formstack to Complete the RED Form for employees
- Tips for scheduling and conducting the feedback sessions in a virtual environment

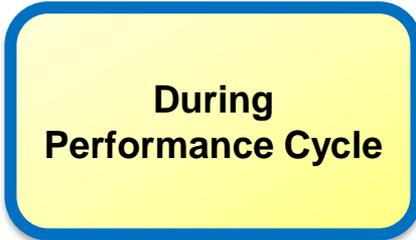


- Creates a forum for **open dialogue** between employee and manager.
- Provides an opportunity for managers to share the **direction of the University/department/unit** and how each employee's job fits in.
- Clarifies **mutually understood expectations** and provides a basis for measuring an employee's ongoing performance.
- Provides opportunity for **coaching** and giving **feedback**.

Stages of Performance Cycle



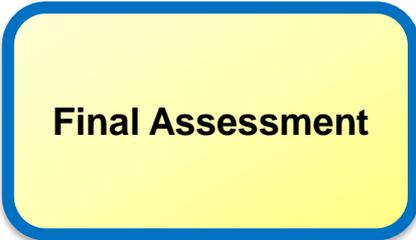
**Beginning of
Performance
Cycle**



**During
Performance Cycle**



**End of
Performance
Cycle**



Final Assessment

June 1st through May 31st

Objectives	60%	What	Achievements, results, outputs measured in terms of Quality, Quantity, Time
St. John's University's Values at Work & Competencies	40%	How	Through St. John's University's Values, how do you apply behaviors, skills knowledge to the job
Development Plan		How to	Opportunities to grow or improve

Performance Planning: Objective Setting

- Occurs at the beginning of the cycle. Foundation for the whole process.
- Lets you know what's expected and how your performance will be assessed.
- Gives you the opportunity to provide input about how to perform your job.
- Helps you stay on track and remain clear on changing priorities throughout the cycle.
- Positions you for success; eliminates surprises.
- Focuses on the results of your work.
- Aligns the institutional priorities throughout the organization so that we're all working toward the same end.



How Are Objectives Developed?



Think About:

- How to translate tasks into results and differentiate between a task and the expected result(s) of the effort.
- The specific results you will be held accountable for.
- Why are you doing this? How will you know if your goal has been achieved?
- Who receives the service you provide?
- What do the recipients expect in terms of **quality**, **quantity** and **timeliness**?
- The SMART Criteria.



Manager communicates to employee job objectives for performance cycle

- Identify a minimum of 3 objectives (recommend no more than 5)
- Align job objectives to department objectives and foundational themes
- Ensure objectives meet S.M.A.R.T. criteria (Specific, Measurable, Attainable, Relevant, and Time-Bound)
- Link objectives/key responsibilities to the job. **Note:** If 2 or more employees perform the same job, then objectives & responsibilities must be the same
- Specify a weighting for each objective/key responsibility

Objective	Weighting
Objective 1 – Design and Delivery of Training Programs- During the fiscal year , deliver 2-3 workshops for <u>each</u> of the following programs): Quality Service, Time Management, Active Listening, Effective Meetings, Coaching, Managing for Success, etc., with a very good/excellent rating of 90% and ensure participation rate is consistent with targets	35%
Objective 2 – Complete the certificate tracking project so that each active administrator and staff member has a completed profile established in the Excel spreadsheet by May 31, 2022.	25%
Objective 3 – Develop a Telecommuting online course in Canvas, complete with evaluation and review questions, by April 30, 2022.	20%
Objective 4 – Develop and pilot Adapting to Change by August 31, 2021. Train 25 people by 12/31/21 with a very good/excellent rating of at least 90%.	20%
Objective totals	100%

Staff Competencies – 40% Overall Weighting

The Mission/St. John's Values at Work are expressed & integrated into the work at St. John's through the following competencies:

**Provide Timely
and Excellent
Service**

**Diversity
&
Inclusion**

**Quality
of Work**

**Shared
Ownership &
Accountability**

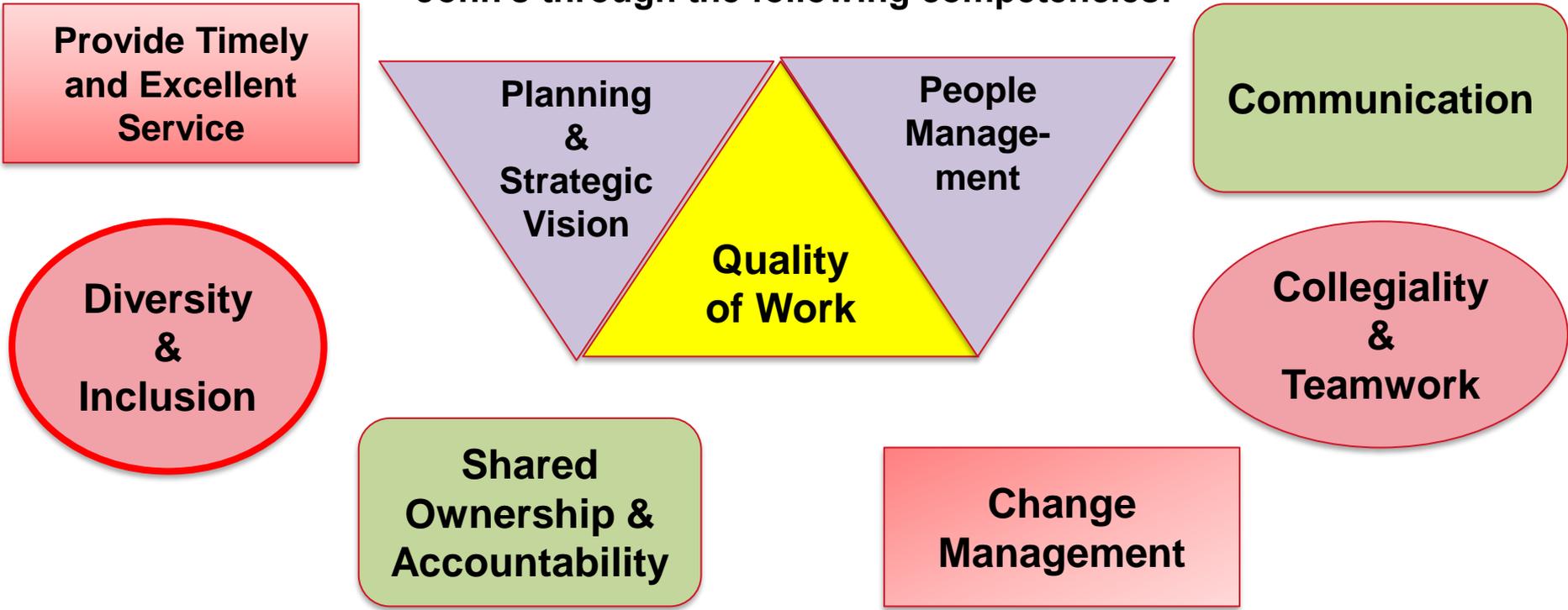
**Adapting to
Change**

Communication

**Collegiality
&
Teamwork**

Supervisor Competencies – 40% Overall Weighting

The Mission/St. John's Values at Work are expressed & integrated into the work at St. John's through the following competencies:



During the Performance Cycle



Check in with employees throughout the year to ensure employees are on track and objectives remain relevant

Note significant accomplishments, changes in direction, or areas for improvement

Any changes in objectives during the reporting period must be discussed with the employee and signed and dated by both manager and employee

No rating and no paperwork submitted to HR

End of Performance Cycle

- **End of May** - Request that employees complete self-assessment for submission by second week of June (in typical year). **This year, complete self-assessment within 30 days of receiving link to Formstack RED Form.**
- **By July 31** - Prepare final assessment using the employee's self-assessment as a guide. Managers are asked to write their final assessment in the Formstack RED Form.
- **Note:** If you need additional time to submit your ratings, please contact your HR Services' representative.



Karen Crowley: 718-990-1502; Cynthia Simpson: 718-990-6333.



Note: If you are a new manager or you have new direct reports, you should contact HR Services for a copy of your direct reports' prior year evaluation.

- Consult your performance log.
- Ensure that comments include specific, factual and descriptive examples that are job-related and behaviorally written.
- Make sure comments match the rating.
- Strive for clarity.
- Focus on accomplishments and results produced.
- Identify strengths and development areas.

Comments are required for each rating except PW

EP = Exceptional Performance	Performance consistently and significantly exceeds departmental and position expectations
PW+ = Performs Well Plus	Performs well in all aspects of the job, exceeds expectations in a few areas
PW = Performs Well (no written rationale required)	Performance consistently meets expectations and job requirements
NI = Needs Improvement	Performance consistently does not meet expectations and improvement is required.
DNM – Does not meet expectations	Performance does not meet expectations

Completing Your Self Assessment

- Use the **RED** form to complete your self-assessment
- Send self-assessment to your manager prior to your performance discussion meeting.
- Be as honest and factual as possible.
- List all of your accomplishments from the year; note reasons for set-backs.
- Include enough specific details so that your manager understands your contributions.
- Highlight changes in priorities that arose during the cycle.
- Expect your manager to add comments accordingly.
- Understand that your supervisor has final say.

Self-Assessment Samples

- I have been attending departmental meetings with the goal of making suggestions to improve work processes, and one of my suggestions, xxxxxxx, resulted in a change in procedures that has saved the department over \$2,000 this year alone.
- Despite the reduced headcount in our department, I have completed my database project on time and \$1,000 under budget. As a result, students can now access their information in two clicks instead of four and the information is updated immediately instead of every 24 hours.
- During the past year, I documented 5 of 7 work processes that were used to train new student workers hired by the department. The documentation resulted in reduced time spent to train the student workers and now serve as desk procedures.

- Refer back to your list of accomplishments.
- Complete your Self-Assessment before the meeting. Be objective about the things you did well and the areas where you could have done better.
- Be prepared to discuss your Self-Assessment during the meeting with your manager.
- Discuss areas you would like to develop and/or career interests you may have.
- Be open to feedback and ask questions if you don't understand something.



- HR Services Contacts: ext. 1502 or 6333
- Employee Assistance Program (EAP)
- University Information System (UIS) – list of training workshops
- HR Training & Development Professional Development Workshops and Certificate Programs
- LinkedIn Learning.com



- Supervisors should send to their direct reports, via email, the RED form complete with their narrative comments and ratings at least 24 hours before the scheduled meeting.
- Plan on each meeting to last 45-60 minutes.
- Conduct the meeting in-person, via TEAMS, or WebEx Meetings.
- Use your webcam for these meetings – it is important that supervisors and direct reports see each other.
- Discuss the present year's performance and toward the end of the meeting discuss next year's goals.



HR Services Representatives

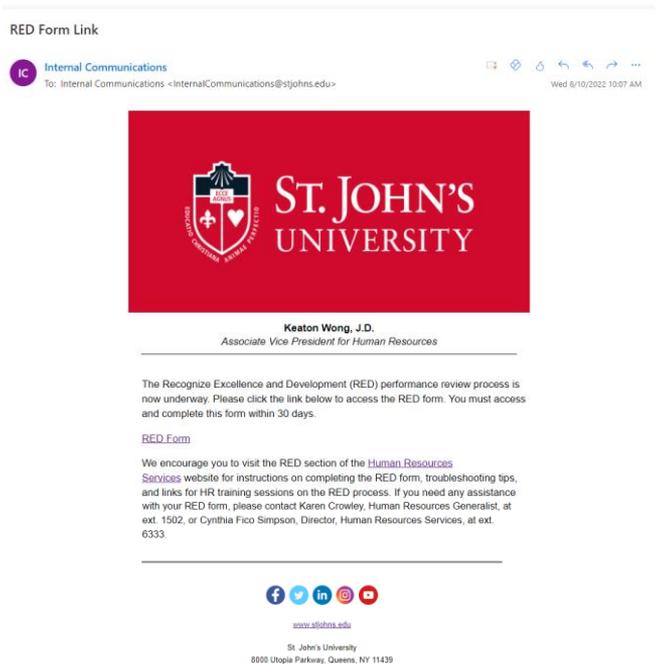
Contact	Telephone #	Email address
Karen Crowley	718-990-1502	crowleyk@stjohns.edu
Cynthia Simpson	718-990-6333	simpsoc1@stjohns.edu

[HR Services' Web page](#)

[Resources for Telework Success](#)

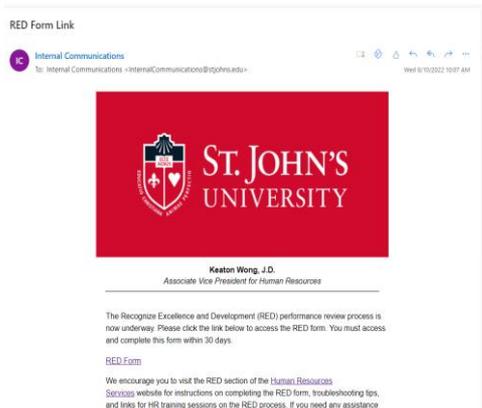
Employee Starts RED Process

All employees will receive an email from the Office of Human Resources transmitting a link to the RED Form.



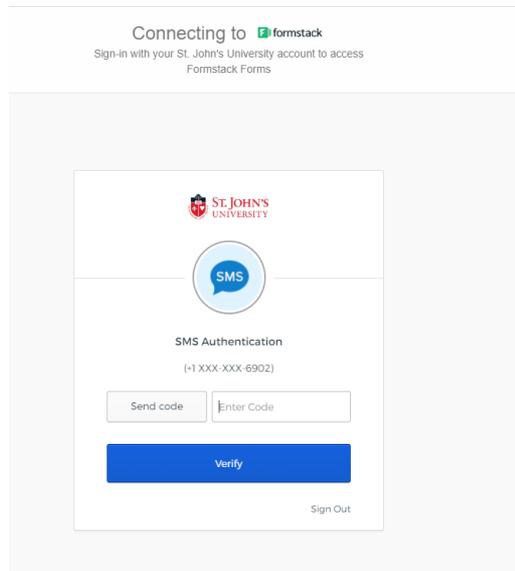
Note: Training recommends that you create an Outlook email archive folder for yourself and label it **RED 2022** to store the RED-related emails you will receive from HR and Formstack.

Click on the **RED Form** link.

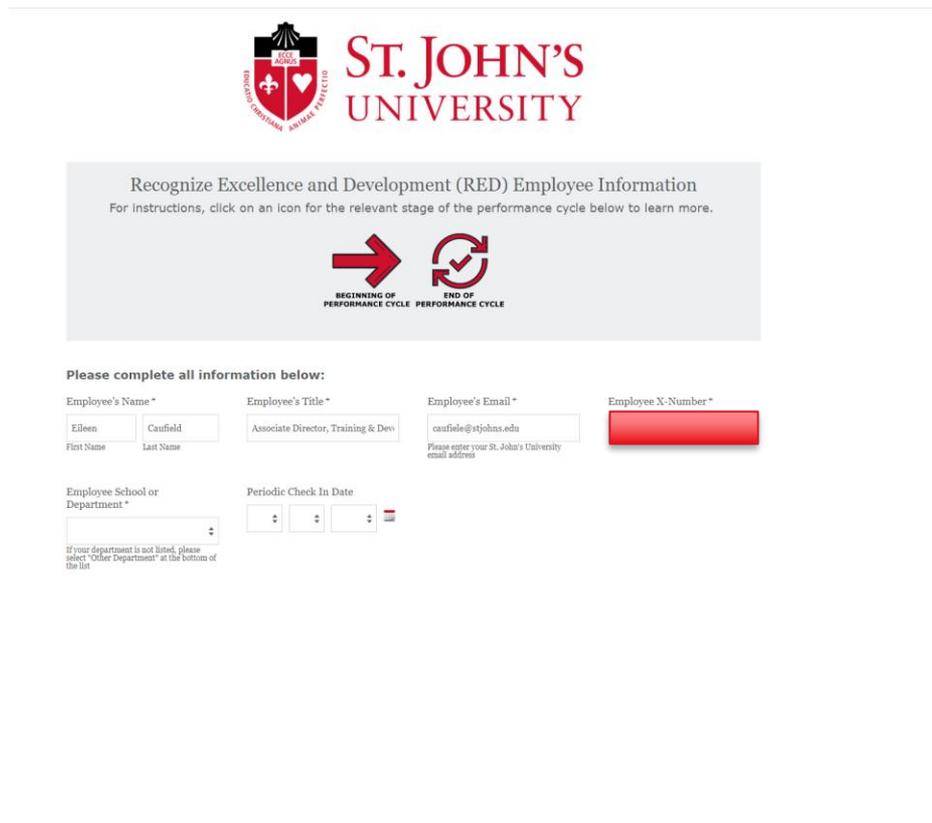


You will be asked to provide a two-factor authentication code in order to access the RED Form.

Click on **Send code**, enter the code and click on **Verify**.



Result after you enter your verification code: You will be brought to the RED Form with some of your personal information pre-filled on the form. Scroll through the form to continue to complete the RED Form.



The screenshot shows the 'Recognize Excellence and Development (RED) Employee Information' form. At the top, there is the St. John's University logo and name. Below that, a grey box contains the title and instructions, along with two icons: a red arrow pointing right labeled 'BEGINNING OF PERFORMANCE CYCLE' and a circular arrow with a checkmark labeled 'END OF PERFORMANCE CYCLE'. The main form area is titled 'Please complete all information below:' and contains several input fields:

- Employee's Name ***: Two text boxes for 'First Name' (containing 'Eileen') and 'Last Name' (containing 'Caufield').
- Employee's Title ***: A text box containing 'Associate Director, Training & Dev'.
- Employee's Email ***: A text box containing 'caufile@stjohns.edu' with a note below: 'Please enter your St. John's University email address'.
- Employee X-Number ***: A red rectangular button.
- Employee School or Department ***: A dropdown menu.
- Periodic Check In Date**: A date picker with a calendar icon.

At the bottom left, there is a small note: 'If your department is not listed, please select "Other Department" at the bottom of the list'.

1. Login to the St. John's website
2. Scroll to the footer and select **Human Resources**



3. From the HR webpage, click on **Human Resources Services**



4. Scroll down to the section that reads **Employee Performance Management – Recognize Excellence and Development (RED)** and in the expandable section **For All Employees**, click on the plus sign **+** to expand the section

Employee Performance Management - Recognize Excellence and Development (RED)

RED is St. John's University's annual, cyclical, performance management program for staff and administrators. To help employees and supervisors get the most out of the performance management process, the following resources, tools and training are provided:

For All Employees



5. Click on the **RED Form** at the entry, *Access the RED Form*



For All Employees

- Access the [RED Form](#) (a Formstack document)
- [RED process for all employees](#)
- Formstack [troubleshooting tips](#) from the St. John's IT Service Desk
- Beginning of cycle instructions and setting objectives ([PDF](#))
- S.M.A.R.T. goals template ([Word](#))
- Employee Competencies ([PDF](#))
- Supervisor Competencies ([PDF](#))
- End of cycle instructions and self-assessment ([PDF](#))
- Professional development planning ([PDF](#))

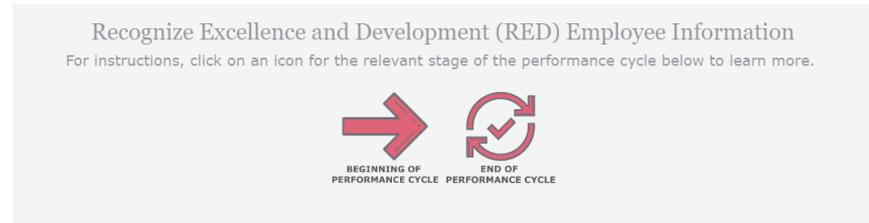
Result: You will be brought to the RED Form with some of your personal information pre-filled on the form. Scroll through the form to continue to complete the RED Form.



On the Formstack Form for Recognize Excellence and Development (RED) enter the required demographic information. **Note:** Some of the information will be pre-filled for you. Any field marked with an asterisk requires you to enter information; otherwise, you will not be able to submit the form.

Enter the following on the RED Form:

1. Your **First Name, Last Name, Job Title, St. John's Email** address (confirm you email address) and **XID number**. **Note:** You can find your **XID number** on your pay statement above your name and SSN.
2. Select your **School or Department** from the drop-down menu.
3. Leave blank the field that asks for the **Periodic Check In Date** since this is the final assessment.



Please complete all information below:

Employee's Name *	Employee's Title *	Employee's Email *	Employee X-Number *
<input style="background-color: red; color: white; width: 100%;" type="text" value="First Name"/> <input type="text" value="Last Name"/>	<input type="text" value="Multimedia Engineer"/>	<input type="text" value="skrotzkn@stjohns.edu"/>	<input type="text" value="X5555555"/>
		Confirm Employee's Email *	
		<input type="text" value="skrotzkn@stjohns.edu"/>	
<small>Please enter your St. John's University email address</small>			
Employee School or Department *	Periodic Check In Date		
<input type="text" value="Information Technology Suppor"/>	<input type="text"/> <input type="text"/> <input type="text"/>		

Enter the following on the RED Form:

1. Your supervisor's **First Name**, **Last Name**, and **St. John's Email** address (confirm the email address)
2. **Note:** It is important that you enter your supervisor's St. John's email address because when you submit the form, the form will be sent to the email address of the supervisor whose name you entered onto the form.

Recognize Excellence and Development (RED) Supervisor Information
Please complete all information below:

Supervisor's Name *		Supervisor's Email *
<input type="text" value="Eileen"/>	<input type="text" value="Caufield"/>	<input type="text" value="caufiele@stjohns.edu"/>
<small>First Name</small>	<small>Last Name</small>	
Confirm Supervisor's Email *		
<input type="text" value="caufiele@stjohns.edu"/>		
<small>Please enter your Supervisor's St. John's University email address</small>		

For tips on how to write the objectives/key responsibilities, click on the arrow labeled **Beginning of Performance Cycle**.

Employee's Objectives/Key Responsibilities

Please enter the Objectives/Key Responsibilities set by you and your supervisor at the beginning of the performance cycle.

Click the relevant icon below for tips on how to complete this section:



**BEGINNING OF
PERFORMANCE CYCLE**

Write down the objectives (one objective per box) that reflects the major work performed during the reporting cycle. **Note:** You should have between 3-5 major objectives.

#1 Objective/Key Responsibility *

Day-to-Day: Assist in the IT operations of the Queens. Where appropriate, collaborate with IT operation team members to deliver services. Coordinate with IT teams through the use of the ITSM system

#2 Objective/Key Responsibility *

Improvement: Work with the members of the IT team to further enhance the overall operation and service delivery to the St. John's community. Evaluate the performance and quality of the services delivered and participate in the continual service improvement process.

#3 Objective/Key Responsibility *

Outreach: Meet with the St. John's community with the goal of communicating services, addressing service concerns, and discuss future IT related projects

Although you are not asked to rate yourself on the competencies, you should view the list of competencies to address when writing your self-assessment. You can find the [list of competencies](#) on the HR Services webpage in the RED Section. Your supervisor will add the ratings for the competencies.

1. Provide Timely and Excellent Service:

2. Diversity and Inclusivity:

Demonstrates the ability to communicate across differences to create a collaborative, collegial, and caring community. Actively seeks and considers perspectives and experiences from people different from oneself.

3. Shared Ownership/Accountability:

Understands and takes responsibility for individual role in achieving department/university-wide objectives.

4. Adapting to Change:

Demonstrates resiliency. Maintains effectiveness when faced with changes in direction, priorities, schedules, and responsibilities.

5. Collegiality and Teamwork:

Works collaboratively and respectfully within and across departments.

6. Communication:

Communicates clearly, concisely, and respectfully in all interactions.

7. Quality of Work:

Provides accurate complete products and services

8. People Management:

Communicates with employees to set expectations, mentor, coach, support. Sets direction and leads team.

9. Planning and Strategic Vision:

Develops plans to support business unit objectives

Note: Competencies #8 & 9 are for administrators who supervise non-supervisory administrators and staff.

On the RED Form, there is space to enter the steps you have taken to enhance skills/knowledge and abilities during the past year. Identify the skill, the action to be taken and the results i.e., if the action was completed during the past year. **Provide this information to your supervisor so they can enter this information on your RED Form.** Note: Also, think of additional development opportunities to add to the RED Form for the next year.

Professional Development Plan

Click the icon below for tips on how to complete this section



PROFESSIONAL DEVELOPMENT

Skills/knowledge/abilities to be developed (or improved)

Learn to perform a V Lookup to better compare data sets between 2 Excel workbooks.

Action steps/Timeframe

Complete a LinkedIn Learning course on performing V Lookups in Excel by May 31, 2022.

Results/Actions taken

Completed LinkedIn Learning Excel 2016 course on February 22, 2022.

Skills/knowledge/abilities to be developed (or improved)

Improve communications with team members.

Action steps/Timeframe

Complete the University's workshops on Communication Skills Modules I and II and complete LinkedIn Learning course on improving oral communications.

Results/Actions taken

Attended Communication Skills Module I on November 17, 2021.
Attended Communication Skills Module II on March 3, 2022.
Completed LinkedIn Learning course on Interpersonal Communication on April 22, 2022.

For tips on how to write the self-assessment, click on the arrow labeled **End of Performance Cycle**.

Employee's Self-Assessment

For instructions, click on an icon for the relevant stage of the performance cycle below to learn more.



In the box labeled **Employee's Self-Assessment**, write how you met each objective. Where possible, provide data to support how well you met the objective. Also, address how well you met each one of St. John's competencies.

Employee's Self-Assessment

Objective #1 - Deliver 2-3 workshops/webinars for the various program titles during the fiscal year. During the past review cycle, delivered xx number of workshops, and trained xx number of employees. 95% of the workshops received a 90% very good/ excellent rating on the program evaluations. All participation rates were consistent with program targets. During the past fiscal year, xxx of training events were conducted and xxx number of people were trained. Of the xxx number of people trained, yyy completed the training online. All of Training & Development's programs were offered both in-person and in webinar format to support the University's move to a hybrid learning environment.

Objective #2 - Complete training profile for each active administrator and staff by March 31, 2022. In an effort to track the completion of training toward the department's management, professional and continuing education certificates, created a training profile summary in Excel for each active administrator and staff member. This will facilitate T&D's tracking of those who have completed and/or close to completing the training requirements for the respective learning certificates. All initial data entry was completed by March 15, 2022. Data will be entered on an on-going basis into the Excel spreadsheet for certificate tracking purposes.

Competencies

Communication – models a direct, open, respectful communication style both in and outside the classroom. Communicates directly with colleagues and clients to achieve the goals of the department. Is willing to ask questions when needed to move the work projects forward, is not afraid to offer an opinion or to speak up when further information is needed. Communicates the priorities of the department to both the T&D assistant and the student workers. Uses email communications effectively to achieve the work of the department.

Quality of Work – looks to submit a quality work product at all times. Is very mindful of the work the department produces and works hard to ensure that all work products are professional, timely and error free.

Important: Prepare and save your self-assessment in a Word document before copying and pasting into the Formstack RED Form.

Saving the RED Form to Complete Later

If you have not completed the self-assessment, and you wish to save it to work on at a later date, click on **Save and Resume Later**. If you are finished with the self-assessment, click on **Submit Form** to submit the self-assessment to your supervisor.

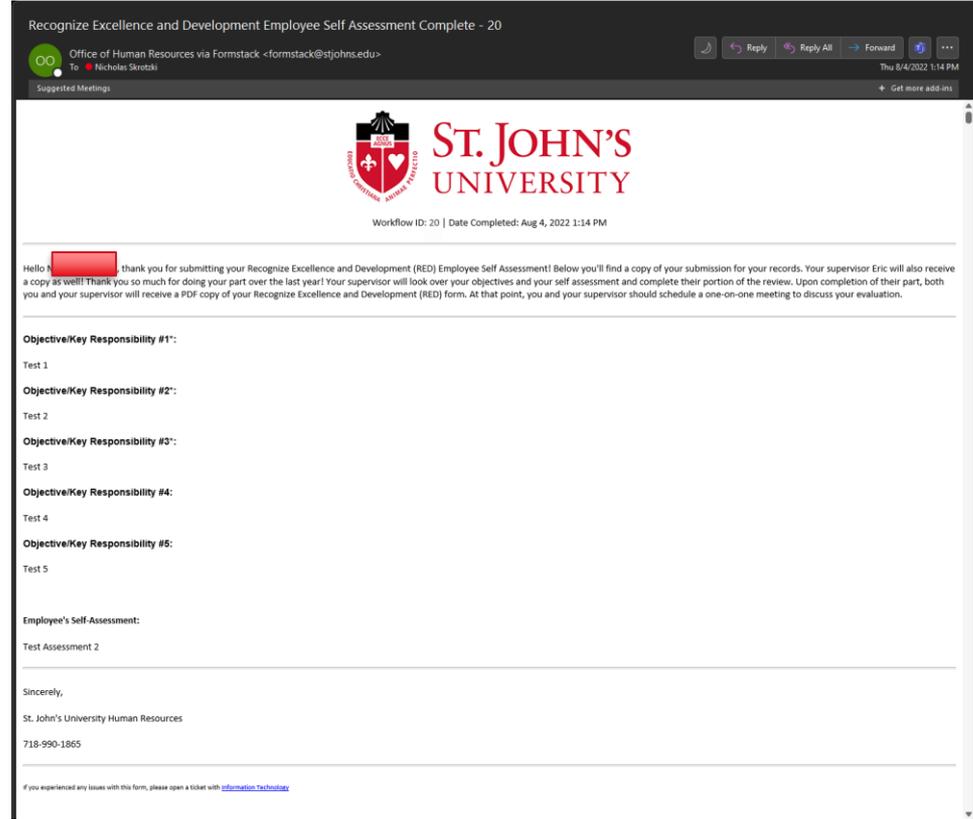
Nothing contained in this St. John's Performance Assessment alters the "at-will" nature of your employment, which means that both you and St. John's University may terminate the employment relationship at any time, with or without notice, reason or cause.

[Save and Resume Later](#)

Submit Form

 Form secured by [Formstack](#)

Upon submission of your RED form and self-assessment to your supervisor, you will receive an email from the Office of Human Resources acknowledging completion of your form and informing you that your supervisor has the action to complete their section of the RED Form.



After your supervisor completes the ratings and supervisor's summary and submits the form, Formstack sends you and your supervisor an email that the Supervisor submitted their ratings and narrative to you, their employee, and transmits a sample copy of the RED Form.

RED Form Complete! - [REDACTED] | Submission ID: 992303315

Office of Human Resources via Formstack
To: [REDACTED]
Cc: Eileen Caufield; hr_formstack@stjohns.edu

Mon 8/1/2022 2:22 PM

X5555555_HR_PFP_2022.pdf
322 KB



ST. JOHN'S
UNIVERSITY

Submission ID: 992303315 | Date Completed |

Hello [REDACTED] and Eileen Caufield. Attached you will both find a sample copy of the completed Recognize Excellence and Development (RED) form. At this point, you should both schedule a one-on-one meeting to go over the finalized form.

Once you have completed your one-on-one meeting, Nicholas Skrotzki will need to sign their Recognize Excellence and Development (RED) form in Formstack with their Supervisor. Once signature is complete, a signed unwatermarked document will be sent to both Nicholas and Eileen. Failure to sign your agreed upon RED Form will result in the RED process not being complete.

Sincerely,
St. John's University Human Resources

After your supervisor completes the ratings and supervisor's summary and submits the form, **Formstack** sends you and your supervisor a **sample** copy of the RED Form. Supervisors are required to schedule a meeting with their direct reports to discuss the RED Form.

Recognize Excellence and Development (RED)

Revised 4/16/2022

<p>Employee's Name: Nicholas Skrotzki Title: Multimedia Engineer Email: skrotzn@stjohns.edu Number: 9555555555 School or Department: Business Analytics & Info. Systems Periodic Check In Date:</p>	<p>Supervisor's Name: Glenn Coufale Title: Associate Director of Training Email: coufale@stjohns.edu</p>
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Objectives/Key Responsibilities – 60% overall weighting

Objectives	Rating/Weight
#1 Objective/Key Responsibility: Day-to-Day: Assist in the IT operations of the Queens. Where appropriate, collaborate with IT operation team members to deliver services. Coordinate with IT teams through the use of the ITSM system.	PW+ Weighting: 30%
#2 Objective/Key Responsibility: Improvement: Work with the members of the IT team to further enhance the overall operation and service delivery to the St. John's community. Evaluate the performance and quality of the services delivered and participate in the continual service improvement process.	PW+ Weighting: 20%
#3 Objective/Key Responsibility: Outreach: Meet with the St. John's community with the goal of communicating services, addressing service concerns, and discuss future IT related projects.	PW Weighting: 20%
#4 Objective/Key Responsibility: Learning: In combination with on-the-job training, LinkedIn Learning, and approved conferences/trainings/seminars, continue to expand the breadth and depth of applicable knowledge. Furthermore, share any key findings with fellow team members.	PW+ Weighting: 20%
#5 Objective/Key Responsibility:	Weighting %: 00%

OVERALL YEAR-END RATING SCALE: OBJECTIVES & KEY RESPONSIBILITIES: PW+

Competencies – 40% overall weighting

Competencies	Rating
1. Provides Timely and Excellent Service:	PW+
2. Diversity and Inclusivity:	SP
3. Shared Ownership/Accountability:	PW
4. Adapting to Change:	PW
5. Collegiality and Teamwork:	PW+
6. Communication:	PW+
7. Quality of Work:	SP

SUPERVISOR'S ONLY

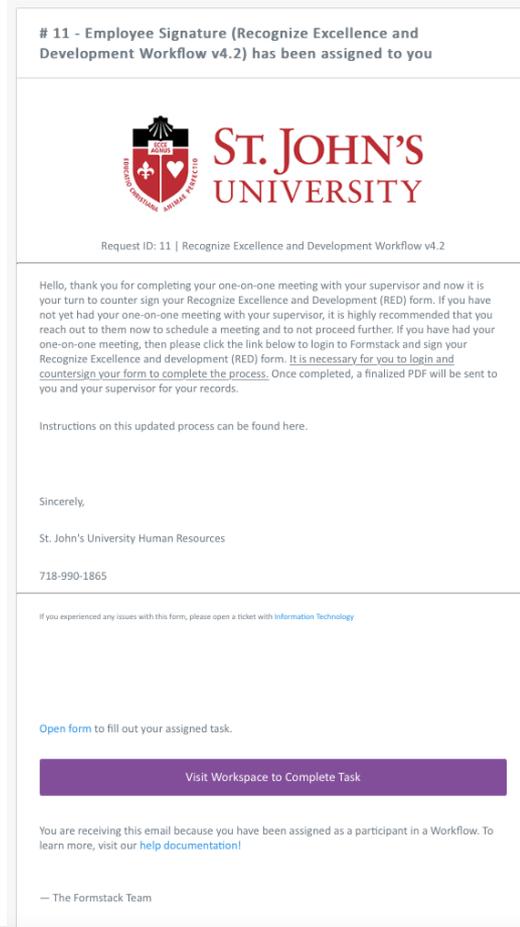
8. People Management:	
9. Planning and Strategic Vision:	

OVERALL YEAR-END RATING: COMPETENCIES / ST. JOHN'S MISSION AND VALUES AT WORK PW+

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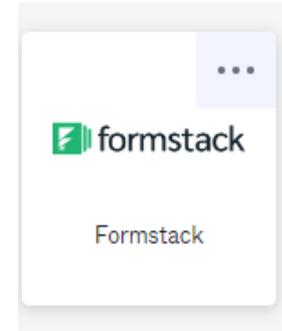


After the one-on-one meeting is held, supervisor signs the employee's RED Form, and the employee receives a workflow assignment requesting their signature on the RED.



The employee needs to access the **Formstack Workspace** by clicking on **Visit Workspace to Complete Task** to sign the employee's RED Form.

Or, you can access the **Workspace** by clicking on the **Formstack** tile from the dashboard.



You will be brought to the login screen for Formstack. Enter your St. John's email address and click on **Log into Formstack**.

Welcome back to Formstack

EMAIL ADDRESS

Log into Formstack

OR



SIGN IN WITH GOOGLE

[Forgot Your Password?](#)

[Don't have an account? Try out Formstack for free!](#)

Select Log in with SignOn.

Note: If you are already signed in with your Okta sign-in, you will be brought to your Formstack Workspace. If you have not signed into Okta, you will be asked to enter your St. John's username and password.

Please enter your password

EMAIL ADDRESS [Log in as different User](#)

caufiele@stjohns.edu

PASSWORD [Forgot Your Password?](#)

|

Log into Forms

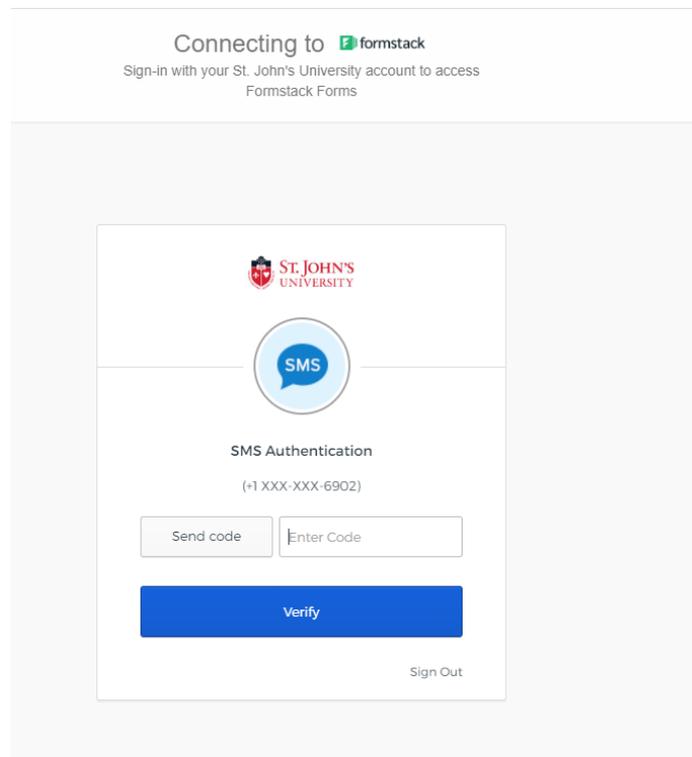
OR

[Log in with SignOn](#)

Don't have an account? [Try out Forms for free!](#)

You will be asked to provide a two-factor authentication code in order to access the RED Form.

Click on **Send code**,
enter the code and click
on **Verify**.



Connecting to  formstack
Sign-in with your St. John's University account to access
Formstack Forms

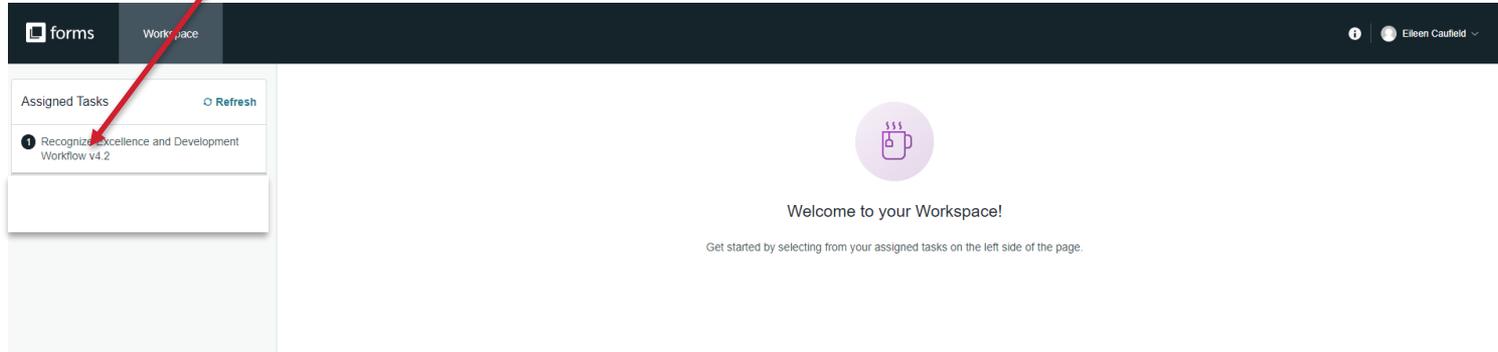
 ST. JOHN'S
UNIVERSITY



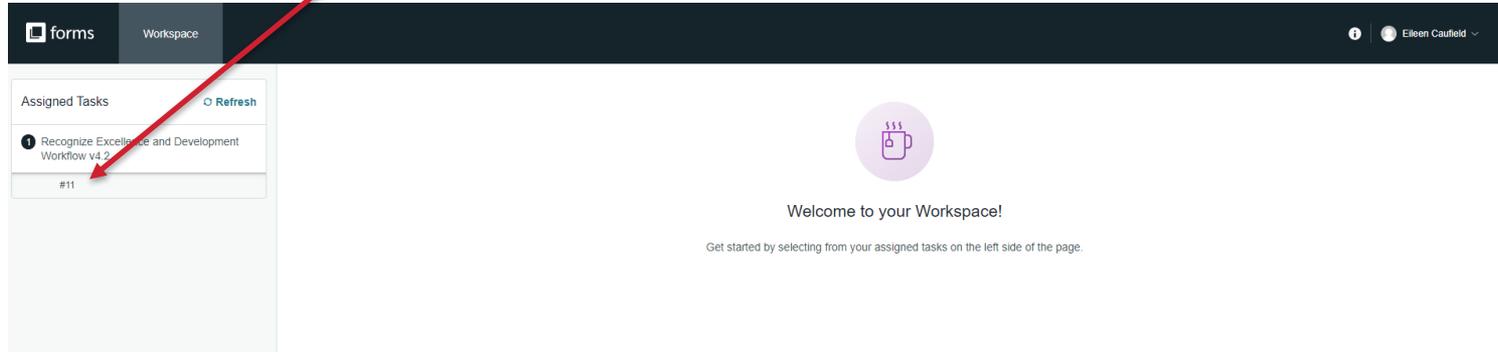
SMS Authentication
(+1 XXX-XXX-6902)

[Sign Out](#)

Click on **Recognize and Excellence and Development Workflow v4.2** from the Formstack Workspace.

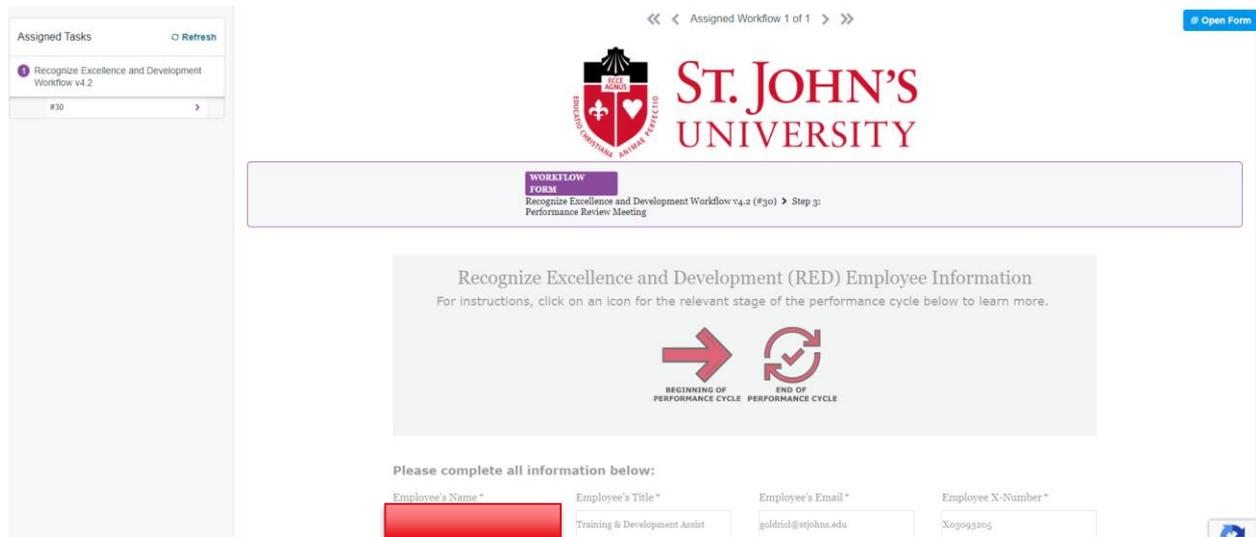


Click on the Workflow # that corresponds to your RED Form.



The screenshot shows the Formstack interface. On the left, under 'Assigned Tasks', there is a list item: 'Recognize Excellence and Development Workflow v4.2' with a sub-item '#11'. A red arrow points from the text above to the '#11' item. The main workspace area displays a 'Welcome to your Workspace!' message and a 'Get started by selecting from your assigned tasks on the left side of the page.' instruction.

While on the screen that displays your RED Form, click on **Open Form** to open-up the RED Form.



The screenshot displays a web interface for a performance review workflow. On the left, a sidebar titled 'Assigned Tasks' shows a task 'Recognize Excellence and Development Workflow v4.2' with a sub-item '#30'. The main content area features the St. John's University logo and a navigation bar with 'Assigned Workflow 1 of 1'. Below this, a purple box labeled 'WORKFLOW FORM' indicates the current step: 'Recognize Excellence and Development Workflow v4.2 (#30) > Step 3: Performance Review Meeting'. The central section is titled 'Recognize Excellence and Development (RED) Employee Information' and includes instructions to click on icons for 'BEGINNING OF PERFORMANCE CYCLE' (a red arrow) and 'END OF PERFORMANCE CYCLE' (a red circular arrow with a checkmark). At the bottom, a form titled 'Please complete all information below:' contains four input fields: 'Employee's Name *' (with a red error bar), 'Employee's Title *' (containing 'Training & Development Assistit'), 'Employee's Email *' (containing 'goldrid@stjohns.edu'), and 'Employee X-Number *' (containing 'X09093205'). An 'Open Form' button is visible in the top right corner.

Scroll through the RED Form until you arrive at the Employee Signature section.

Note: At this point you have the option to enter additional comments if you do not agree with the supervisor's comments or wish to provide an additional explanation in response to supervisor's comments.

If you wish to add comments,

1. Select **Yes** in response to the question that asks for additional comments
2. Enter comments in the text box
3. Enter **First Name, Last Name, Date of Employee Completion (Signature)**
4. Click on **Submit Form**.

Recognize Excellence and Development (RED) Employee Signature

Once a one-on-one meeting between supervisor and employee has been completed, please complete the following section below to finish the Recognize Excellence and Development process.



This section should ONLY be completed during or at the conclusion of one on one meetings between the employee and supervisor listed above.

Would you like to include any additional comments with your Recognize Excellence and Development (RED)?

Yes

Please enter your Recognize Excellence and Development (RED) comments *

Employee's Name *

First Name Last Name

Employee Completion Date *

08 01 2022

Nothing contained in this St. John's Performance Assessment alters the "at-will" nature of your employment, which means that both you and St. John's University may terminate the employment relationship at any time, with or without notice, reason or cause.

[Save and Resume Later](#)

Form secured by  Formstack

If you have no additional comments to make, select **No** in response to the question that asks if you would like to include additional comments,

1. Enter **First Name**, **Last Name**, and **Date** when you complete the form.
2. Click on **Submit Form**.

Recognize Excellence and Development (RED) Employee Signature

Once a one-on-one meeting between supervisor and employee has been completed, please complete the following section below to finish the Recognize Excellence and Development process.



This section should ONLY be completed during or at the conclusion of one on one meetings between the employee and supervisor listed above.

Would you like to include any additional comments with your Recognize Excellence and Development (RED)?

Employee's Name * Employee Completion Date *

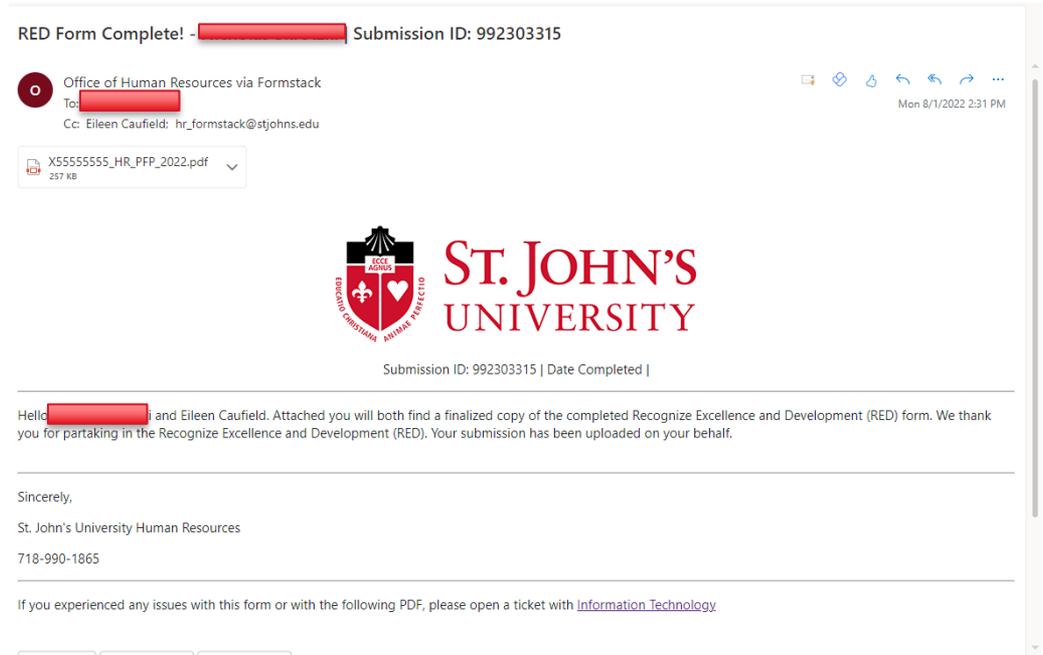
<input type="text"/>	<input type="text"/>	<input type="text" value="08"/>	<input type="text" value="01"/>	<input type="text" value="2022"/>	
First Name	Last Name				

Nothing contained in this St. John's Performance Assessment alters the "at-will" nature of your employment, which means that both you and St. John's University may terminate the employment relationship at any time, with or without notice, reason or cause.

[Save and Resume Later](#)

 Form secured by **Formstack**

After you sign and submit the RED Form, Formstack sends to both the supervisor and you, the employee, an email notifying you that the process has been completed and Formstack transmits a final copy of the RED to both you and your supervisor.



Formstack sends to both the supervisor and the employee a final copy of the RED. Copies are also sent to HR and uploaded to Banner Xtender.

Recognize Excellence and Development (RED)

Revised 8/1/2022

Employee's Name: [REDACTED] Supervisor's Name: Eileen Caufield
 Title: Multimedia Engineer Title: Associate Director of Training
 Email: skrotzn@stjohns.edu Email: caufele@stjohns.edu
 XNumber: X5555555
 School or Department: Human Resources
 Periodic Check in Date: Final Assessment Date: 08/01/2022

Objectives/Key Responsibilities – 60% overall weighting

Objectives	Rating/Weight
#1 Objective/Key Responsibility: Day-to-Day: Assist in the IT operations of the Queens. Where appropriate, collaborate with IT operation team members to deliver services. Coordinate with IT teams through the use of the ITSM system.	PW+ Weighting: 35%
#2 Objective/Key Responsibility: Improvement: Work with the members of the IT team to further enhance the overall operation and service delivery to the St. John's community. Evaluate the performance and quality of the services delivered and participate in the continual service improvement process.	PW+ Weighting 25%
#3 Objective/Key Responsibility: Outreach: Meet with the St. John's community with the goal of communicating services, addressing service concerns, and discuss future IT related projects.	PW Weighting 20%
#4 Objective/Key Responsibility: Learning: In combination with on-the-job training, LinkedIn Learning, and approved conferences/trainings/seminars, continue to expand the breadth and depth of applicable knowledge. Furthermore, share any key findings with fellow team members.	PW+ Weighting 20%
#5 Objective/Key Responsibility:	Weighting % 100%

OVERALL YEAR-END RATING SCALE: OBJECTIVES & KEY RESPONSIBILITIES: **PW+**

Competencies – 40% overall weighting

Competencies	Rating
1. Provide Timely and Excellent Service:	PW+
2. Diversity and Inclusivity:	EP
3. Shared Ownership/Accountability:	PW
4. Adapting to Change:	PW
5. Collegiality and Teamwork:	PW+
6. Communication:	PW+
7. Quality of Work:	EP

SUPERVISOR'S ONLY

8. People Management:	
9. Planning and Strategic Vision:	

OVERALL YEAR-END RATING: COMPETENCIES /ST. JOHN'S MISSION AND VALUES AT WORK **PW+**

1 | Page 90200315 | X5555555

Saving the RED Form to Complete Later

Important: Prepare and save your self-assessment in a Word document before copying and pasting into the Formstack RED Form.

If you have not completed the self-assessment, and you wish to save it to work on at a later date, click on **Save and Resume Later**.

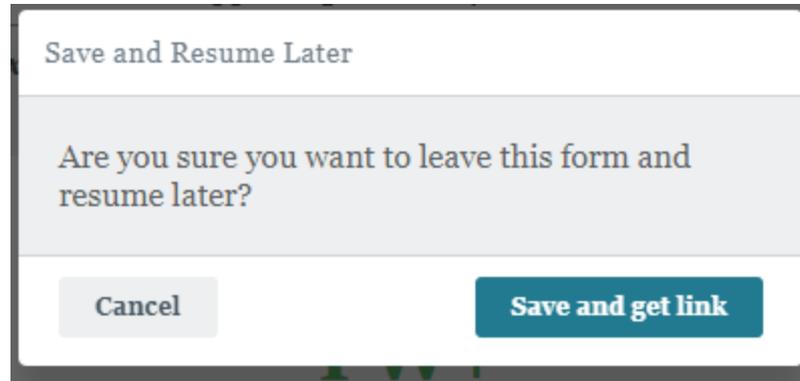
Nothing contained in this St. John's Performance Assessment alters the "at-will" nature of your employment, which means that both you and St. John's University may terminate the employment relationship at any time, with or without notice, reason or cause.

[Save and Resume Later](#)

Submit Form

 Form secured by [Formstack](#)

In response to the system's prompt, click on **Save and get link**.



Save and Resume Later

Are you sure you want to leave this form and resume later?

Cancel **Save and get link**

If you elected to have Formstack send you the link, you will receive a confirmation with a note that the RED Form was sent to your email address. If you did not receive the link, click **Resend email**.



Save and Resume Later

Great! We have sent your link to the supplied email address.

Did you not receive the email with the form link?

[Resend email](#)

Saving the RED Form to Complete Later

Note: If you selected **Save and Resume Later**, you will receive an email sent to your St. John's email address from the Office of Human Resources with a link to your partially completed RED Form.

Important – You have 30 days to resume completing the form. At this point, you have two options: (i) Save the link or (ii) enter your St. John's email address and click on **Send Save and resume link**.

Result: You will receive an email with the link to the partially completed RED Form.



Save and Resume Later

Please copy the link below and save it in a safe place. You can use this link any time within the next 30 days to resume answering questions on the form.

Without the link, the data you have entered cannot be retrieved, and you will have to start filling out the form at the beginning.

https://stjhr.formstack.com/workflows/recognize_excellence_and_development_v4_1_workflow/resume/5hTh04Ge5j

Want us to email you this link? Enter your email below and click 'Send save and resume link'.

[Send save and resume link](#)

If you elected to have Formstack send you the link, you will receive an email from the Office of Human Resources with the link to the RED Form. **Save the email and be sure to resume work on the RED Form within 30 days of receipt of the email.** If you wait more than the 30 days, then you will have to start the form from the beginning.

Recognize Excellence and Development Workflow v4.1 URL

Some content in this message has been blocked because the sender isn't in your Safe senders list. I trust content from noreply@formstack.com. | Show blocked content



Office of Human Resources via Formstack <noreply@formstack.com>

To: Eileen Caufield



Wed 6/22/2022 4:44 PM

External Email

Formstack Logo

Save and Resume Link for Your Form

Please copy the link below and save it in a safe place. You can use this link any time within the next 30 days to resume answering questions on the form.

Without the link, the data you have entered cannot be retrieved, and you will have to start filling out the form at the beginning.

https://stjhr.formstack.com/workflows/recognize_excellence_and_development_v4_1_workflow/resume/5hTh04Gc5i

Thanks for saving your answers!

Copyright © 2022 Formstack, LLC. All rights reserved. This is a customer service email.
Formstack, 11671 Lantern Road, Suite 300, Fishers, IN 46038

When you click on the link in the email from Human Resources, you will be asked to provide the two-factor authentication. Send the code, enter the code and click on **Verify**.

Connecting to  formstack

Sign-in with your St. John's University account to access Formstack Forms



SMS Authentication
(+1 XXX-XXX-6902)

[Sign Out](#)

Saving the RED Form to Complete Later

You will be brought to the partially completed RED Form.

Complete the form and click on **Submit Form** to submit the form to your supervisor.

Recognize Excellence and Development (RED) Employee Information

For instructions, click on an icon for the relevant stage of the performance cycle below to learn more.



thing contained in this St. John's Performance Assessment alters the "at-will" nature of your employment, which means that both you and St. John's University may terminate the employment relationship at any time, with or without notice, reason or cause.

[Save and Resume Later](#)

Submit Form

 Form secured by [Formstack](#)

Please complete all information below:

Employee's Name *	Employee's Title *	Employee's Email *	Employee X-Number *
<input type="text" value="REDACTED"/>	<input type="text" value="Multimedia Engineer"/>	<input type="text" value="skrotzkn@stjohns.edu"/>	<input type="text" value="XsSSSSSS"/>
<small>First Name Last Name</small>		Confirm Employee's Email *	
		<input type="text" value="skrotzkn@stjohns.edu"/>	
		<small>Please enter your St. John's University email address</small>	
Employee School or Department *	Periodic Check In Date		
<input type="text" value="Information Technology Support"/>	<input type="text"/> <input type="text"/> <input type="text"/>		

Thank you!

**Please remember to complete
the evaluations.**

HR Services Representatives

Contact	Telephone #	Email address
Karen Crowley	718-990-1502	crowleyk@stjohns.edu
Cynthia Simpson	718-990-6333	simpsoc1@stjohns.edu