ST. JOHN'S UNIVERSITY

Performance Management Training for Supervisors

2022

Presenter: Eileen Caufield, HR

Today's Topics

- 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

Purpose of Performance Assessment

- 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

Performance Weighting Breakdown

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?

STRATEGIC PLAN

↓

DEPARTMENT'S GOALS

↓

YOUR MANAGER'S OBJECTIVES

↓

YOUR OBJECTIVES

Guidelines for Writing Performance Objectives

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.

Beginning of Performance Cycle: June 1 – July 31

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 – 60% Overall Weighting

Objective	Weighting
Objective 1 – Design and Delivery of Training Programs- During the fiscal year , deliver 2-3 workshops for each 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

Communication

Quality of Work

Diversity & Inclusion

Collegiality & Teamwork

Shared Ownership & Accountability

Adapting to Change

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:

- Provide Timely and Excellent Service
- Planning & Strategic Vision
- People Manage-ment
- Quality of Work
- Communication
- Diversity & Inclusion
- Collegiality & Teamwork
- Shared Ownership & Accountability
- Change Management

Beginning of Performance Cycle: June 1 – July 31

Professional Development Plan – this section is used to identify skills, knowledge and abilities for future growth, growth in the current job or competency development.

Managers must:

- Partner with employee to establish plan to develop knowledge, skills and abilities;
- Provide a timeline within performance review period for progress
- Ensure employee is compliant in all University required training. Ask each employee to attach a copy of his/her training profile.

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.

Writing Comments

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.

Five-Point Rating Scale

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.

Participating in the Performance Discussion

- 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.

Additional Resources

- 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

Tips for Conducting Virtual Feedback Meetings

- 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.

Tips for Conducting your Feedback Meetings

- Focus on the priorities.
- Describe specific situations or behavior.
- Focus on the work; relate feedback to objectives and expectations.
- Balance positive and constructive statements.
- Try to see things from the employee's perspective; share your own experiences.
- Present corrective feedback in positive, actionable way.
- Ensure that the employee understands by asking them to summarize.
- Follow up to monitor improvements and set follow up dates.

Additional Resources

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

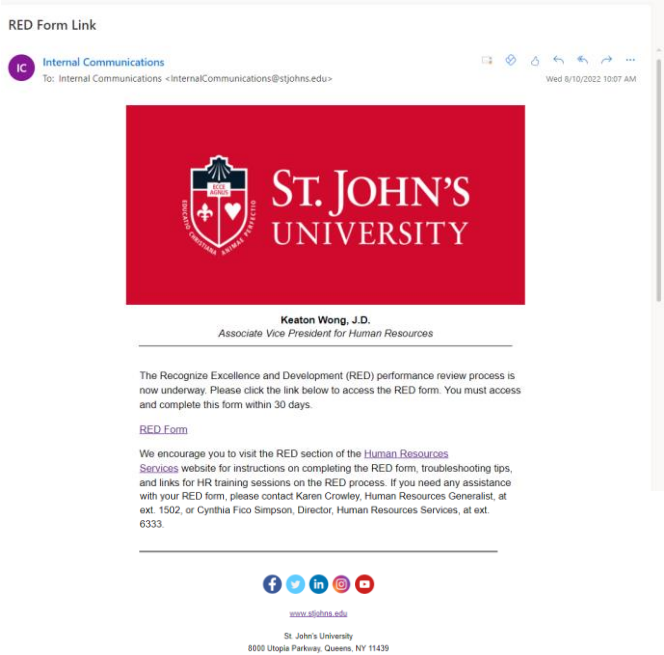
HR Services' Web page

Resources for Telework Success

Employee Starts RED Process

Employee Receives Link to RED Form

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



RED Form Link

Internal Communications
To: Internal Communications <InternalCommunications@stjohns.edu>
Wed 8/10/2022 10:07 AM

ST. JOHN'S UNIVERSITY

Keaton Wong, J.D.
Associate Vice President for Human Resources

The Recognize Excellence and Development (RED) performance review process is now underway. Please click the link below to access the RED form. You must access and complete this form within 30 days.

RED Form

We encourage you to visit the RED section of the Human Resources Services website for instructions on completing the RED form, troubleshooting tips, and links for HR training sessions on the RED process. If you need any assistance with your RED form, please contact Karen Crowley, Human Resources Generalist, at ext. 1502, or Cynthia Fico Simpson, Director, Human Resources Services, at ext. 6333.

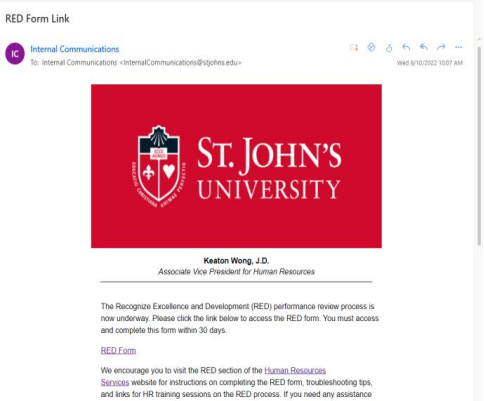
www.stjohns.edu

St. John's University
8000 Utopia Parkway, Queens, NY 11439

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.

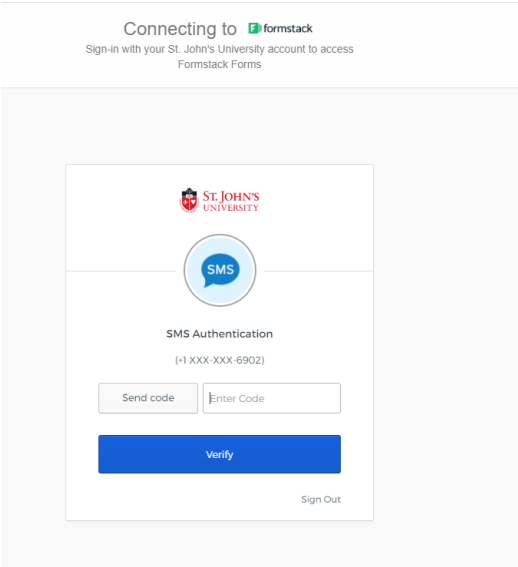
Accessing the RED Form from the HR Email

Click on the **RED Form** link.



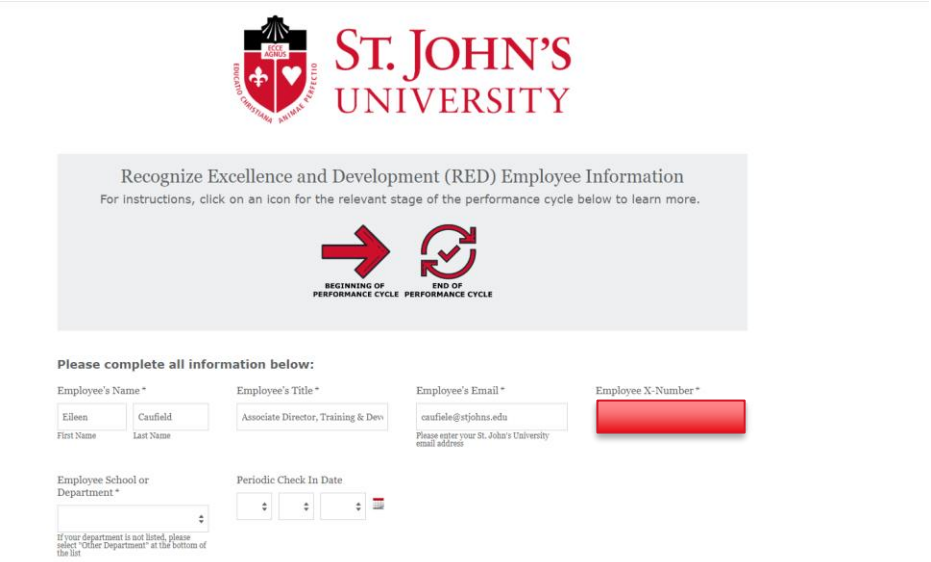
You will be asked to provide a two-factor authentication code in order to access the RED Form.

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



Accessing the RED Form from the HR Email

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.



Accessing the RED Form from the HR Webpage

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**

Accessing the RED Form from the HR Webpage

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

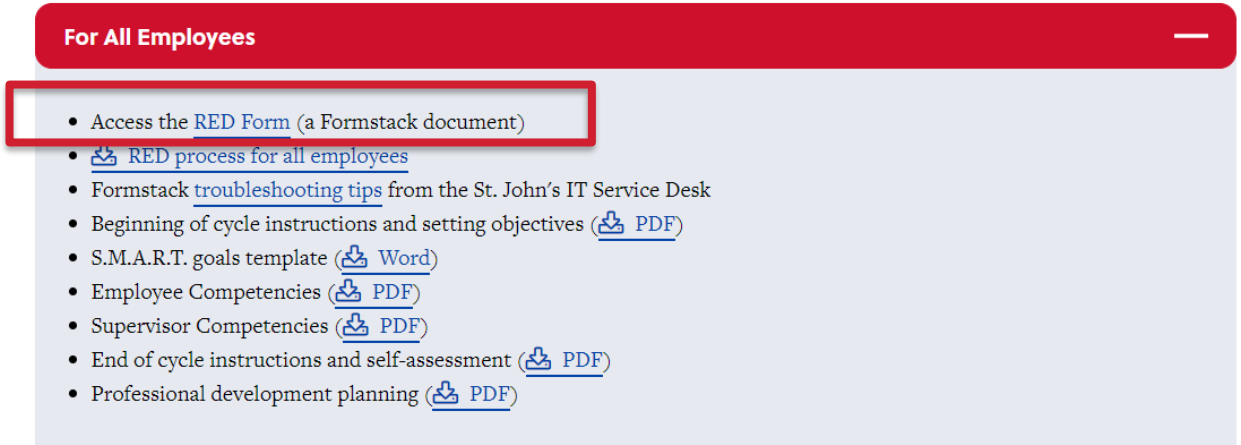
Employee Performance Management - Recognize Excellence and Development (RED)

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 +

Accessing the RED Form from the HR Webpage

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



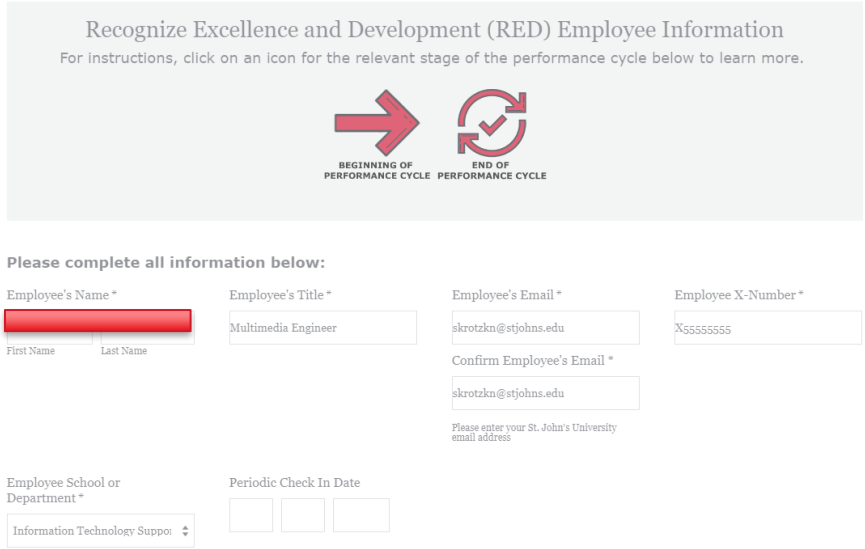
Result: You will be brought to the RED Form with some of your personal information pre-filled on the form. Scroll through the form to continue to complete the RED Form.

Completing the RED Form in Formstack – Employee's Information

On the Formstack Form for Recognize Excellent 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:

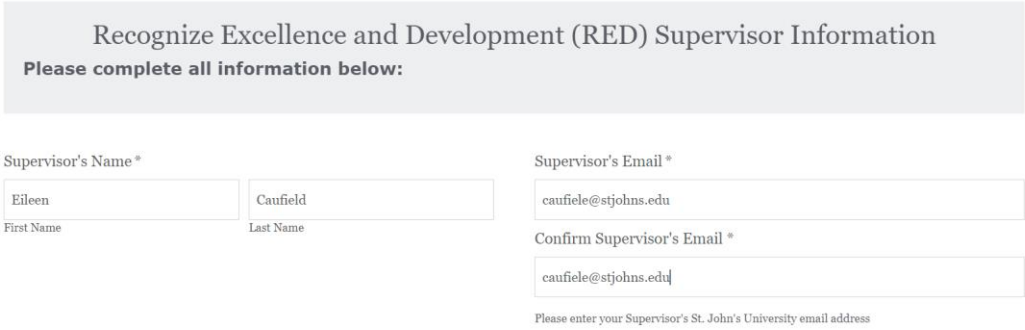
1. Your **First Name**, **Last Name**, **Job Title**, **St. John's Email** address (confirm you email address) and **XID number**. **Note:** You can find your **XID number** on your pay statement above your name and SSN.
2. Select your **School or Department** from the drop-down menu.
3. Leave blank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



Completing the RED Form in Formstack – Supervisor's Information

Enter the following on the RED Form:

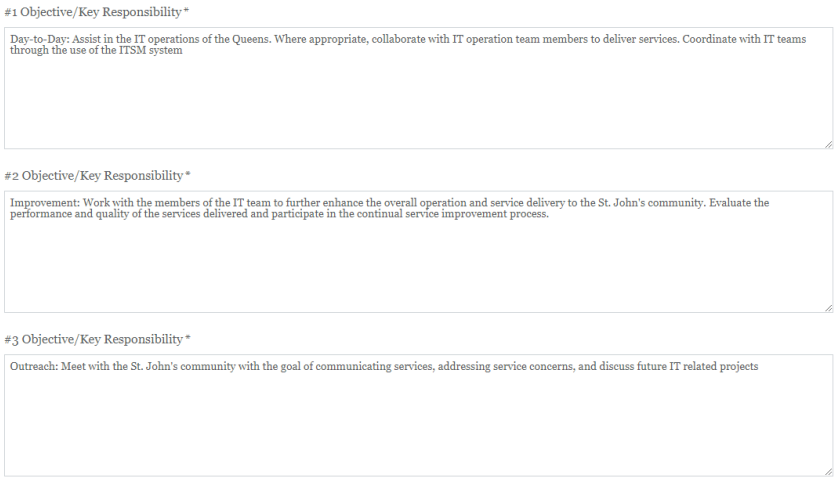
1. Your supervisor's **First Name**, **Last Name**, and **St. John's Email** address (confirm the email address)
2. **Note:** It is important that you enter your supervisor's St. John's email address because when you submit the form, the form will be sent to the email address of the supervisor whose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



Completing the RED Form in Formstack – Objectives

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



Competency Section of RED

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.

Professional Development Plan

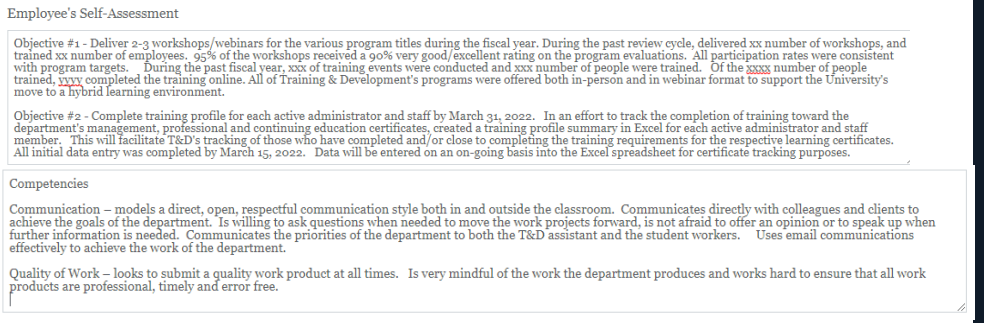
On the RED Form, there is space to enter the steps you have taken to enhance skills/knowledge and abilities during the past year. Identify the skill, the action to be taken and the results i.e., if the action was completed during the past year. **Provide this information to your supervisor so they can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

Skills/knowledge/abilities to be developed (or improved)	Action steps/Timeframe	Results/Actions taken
Learn to perform a V Lookup to better compare data sets between 2 Excel workbooks.	Complete a LinkedIn Learning course on performing V Lookups in Excel by May 31, 2022.	Completed LinkedIn Learning Excel 2016 course on February 22, 2022.
Improve communications with team members.	Complete the University's workshops on Communication Skills Modules I and II and complete LinkedIn Learning course on improving oral communications.	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.

Completing the RED Form in Formstack – Self-Assessment

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

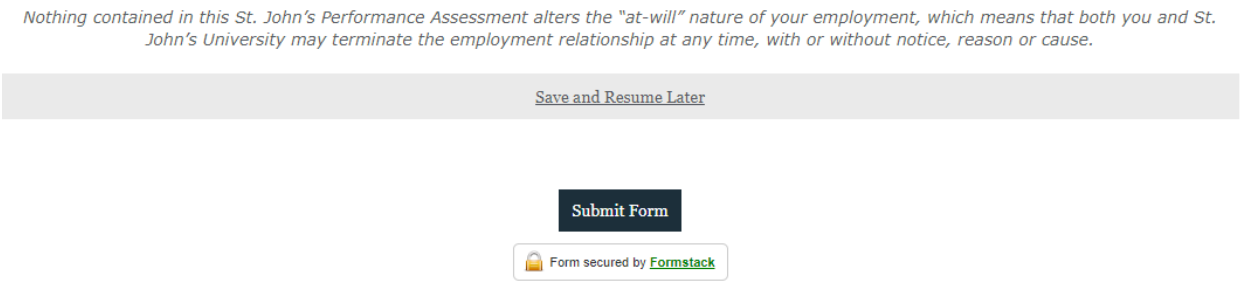
In the box labeled **Employee's Self-Assessment**, write how you met each objective. Where possible, provide data to support how well you met the objective. Also, address how well you met each one of St. John's competencies.



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

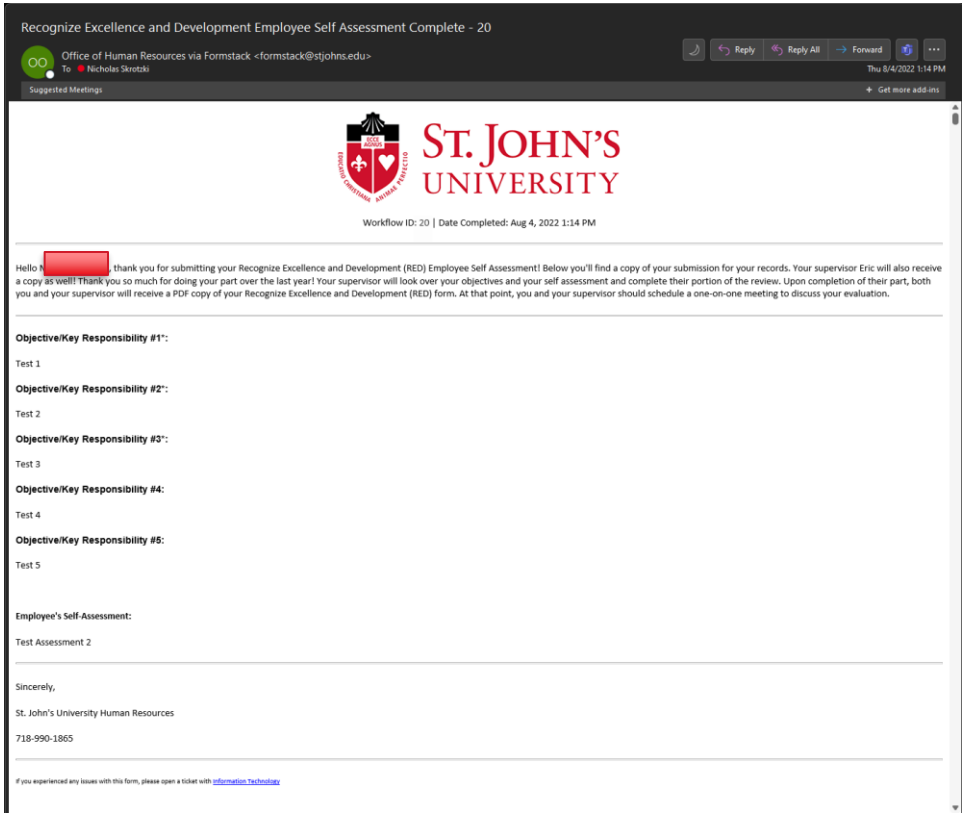
Submitting the RED Form to the Supervisor

If you are finished with the self-assessment, click on **Submit Form** to submit the self-assessment to your supervisor.



Email Notification that RED Was Sent to Supervisor

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.



Recognize Excellence and Development Employee Self Assessment Complete - 20

Office of Human Resources via Formstack <formstack@stjohns.edu>
To Nicholas Skrotzki

Reply | Reply All | Forward
Thu 8/4/2022 1:14 PM

Suggested Meetings | Get more add-ins

ST. JOHN'S UNIVERSITY

Workflow ID: 20 | Date Completed: Aug 4, 2022 1:14 PM

Hello [redacted], thank you for submitting your Recognize Excellence and Development (RED) Employee Self Assessment! Below you'll find a copy of your submission for your records. Your supervisor Eric will also receive a copy as well! Thank you so much for doing your part over the last year! Your supervisor will look over your objectives and your self assessment and complete their portion of the review. Upon completion of their part, both you and your supervisor will receive a PDF copy of your Recognize Excellence and Development (RED) form. At that point, you and your supervisor should schedule a one-on-one meeting to discuss your evaluation.

Objective/Key Responsibility #1*:

Test 1

Objective/Key Responsibility #2*:

Test 2

Objective/Key Responsibility #3*:

Test 3

Objective/Key Responsibility #4:

Test 4

Objective/Key Responsibility #5:

Test 5

Employee's Self-Assessment:

Test Assessment 2

Sincerely,

St. John's University Human Resources

718-990-1865

If you experienced any issues with this form, please open a ticket with Information Technology

Email notifying employee that supervisor submitted RED

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

X55555555_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.

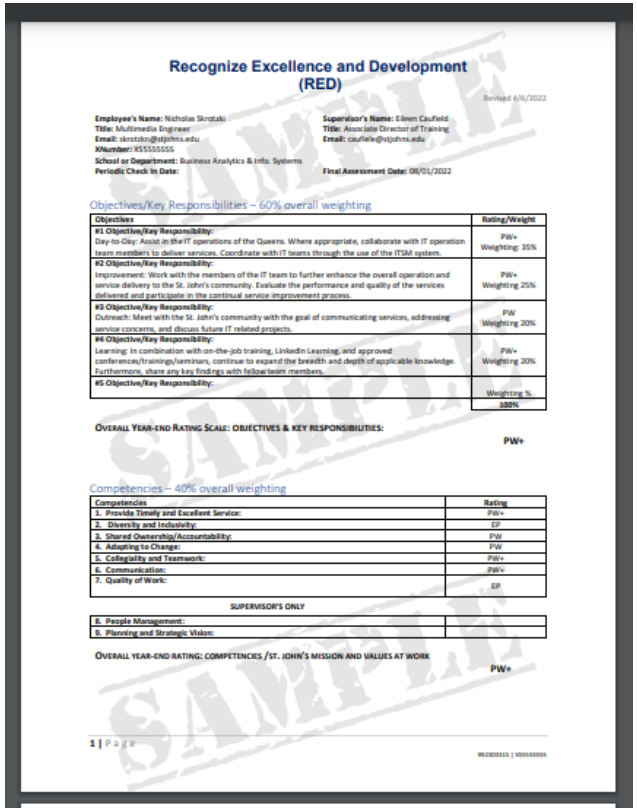
Once you have completed your one-on-one meeting, [redacted] will need to sign their Recognize Excellence and Development (RED) form in Formstack with their Supervisor. Once signature is complete, a signed unwatermarked document will be sent to both Nicholas and Eileen. Failure to sign your agreed upon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

Sincerely,

St. John's University Human Resources

Sample Copy of RED after Supervisor submits RED Narrative

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 4/6/2022

Employee's Name: Nicholas Skrotzki
Title: Multimedia Engineer
Email: skrotzkn@stjohns.edu
XNumber: X55555555
School or Department: Business Analytics & Info. Systems
Periodic Check In Date:

Supervisor's Name: Eileen Caufield
Title: Associate Director of Training
Email: caufielie@stjohns.edu
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

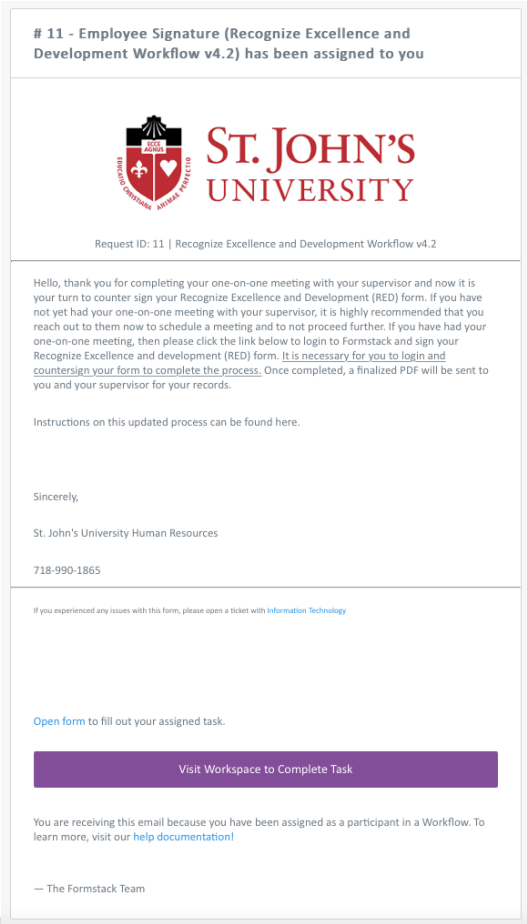
8. People Management:	
9. Planning and Strategic Vision:	

Overall Year-end Rating: Competencies /St. John's Mission and Values at Work PW+

1 | Page

After Review Meeting has been held – Employee Signature Required

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.



11 - Employee Signature (Recognize Excellence and Development Workflow v4.2) has been assigned to you

ST. JOHN'S UNIVERSITY

Request ID: 11 | Recognize Excellence and Development Workflow v4.2

Hello, thank you for completing your one-on-one meeting with your supervisor and now it is your turn to counter sign your Recognize Excellence and Development (RED) form. If you have not yet had your one-on-one meeting with your supervisor, it is highly recommended that you reach out to them now to schedule a meeting and to not proceed further. If you have had your one-on-one meeting, then please click the link below to login to Formstack and sign your Recognize Excellence and development (RED) form. It is necessary for you to login and countersign your form to complete the process. Once completed, a finalized PDF will be sent to you and your supervisor for your records.

Instructions on this updated process can be found here.

Sincerely,

St. John's University Human Resources

718-990-1865

If you experienced any issues with this form, please open a ticket with Information Technology

Open form to fill out your assigned task.

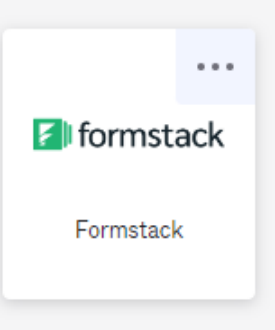
Visit Workspace to Complete Task

You are receiving this email because you have been assigned as a participant in a Workflow. To learn more, visit our help documentation!

— The Formstack Team

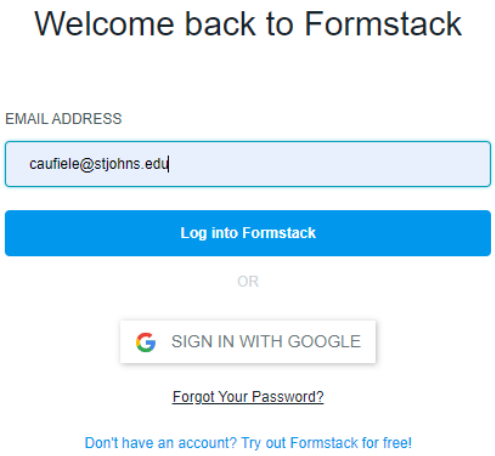
The employee needs to access the **Formstack Workspace** by clicking **on Visit Workspace to Complete Task** to sign the employee's RED Form.

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



Logging into Formstack to Sign RED Form

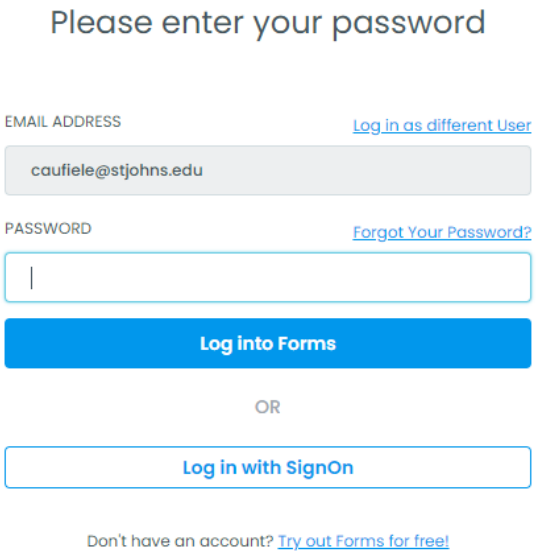
You will be brought to the login screen for Formstack. Enter your St. John's email address and click on **Log into Formstack.**



Logging into Formstack to Sign RED Form

Select Log in with SignOn.

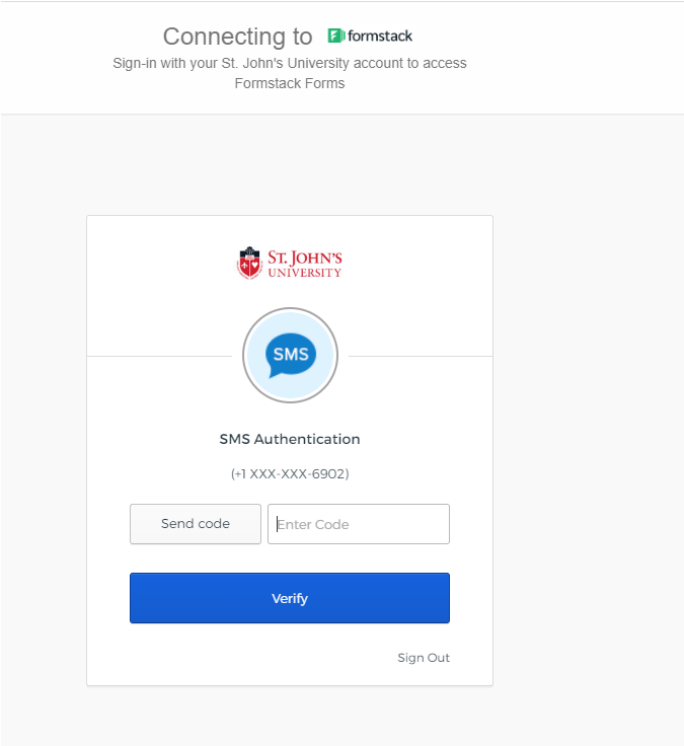
Note: If you are already signed in with your Okta sign-in, you will be brought to your Formstack Workspace. If you have not signed into Okta, you will be asked to enter your St. John's username and password.



Logging into Formstack to Sign RED Form

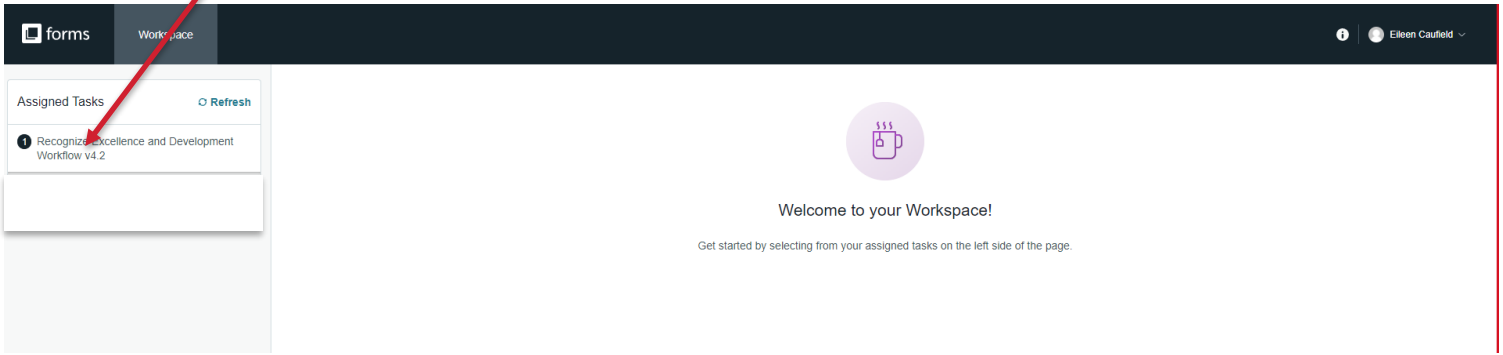
You will be asked to provide a two-factor authentication code in order to access the RED Form.

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



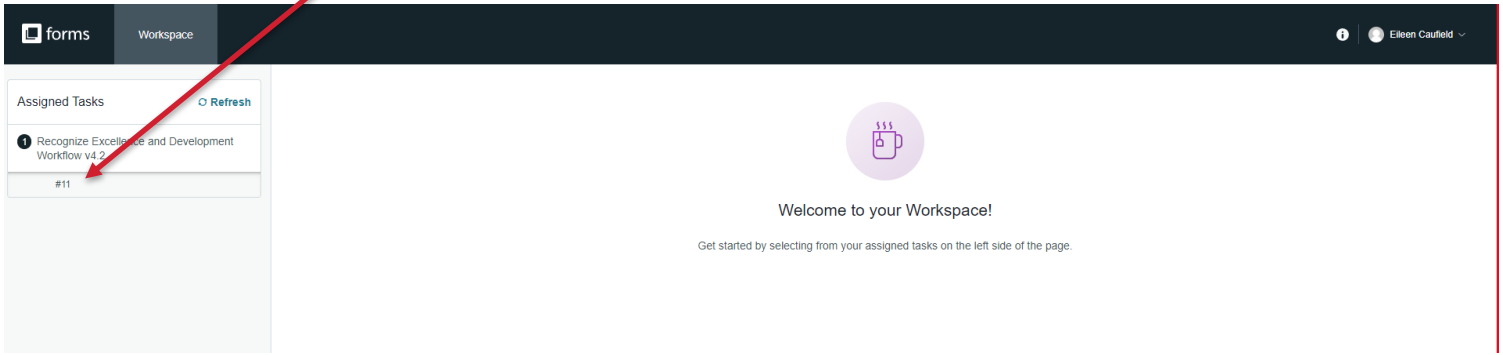
Logging into Formstack to Sign RED Form

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



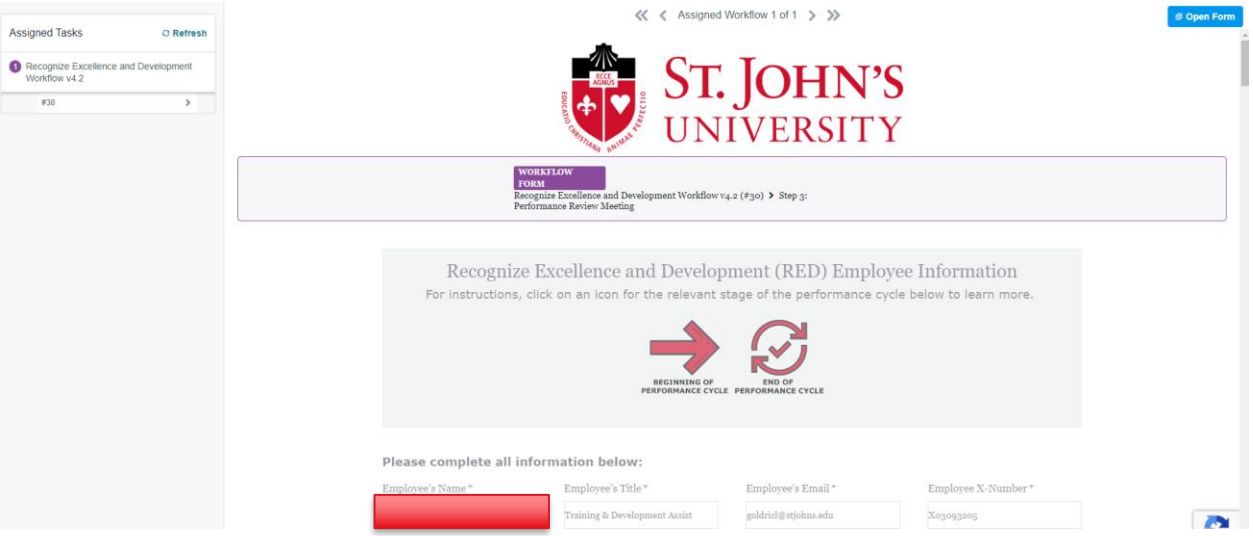
Logging into Formstack to Sign RED Form

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



Logging into Formstack to Sign RED Form

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



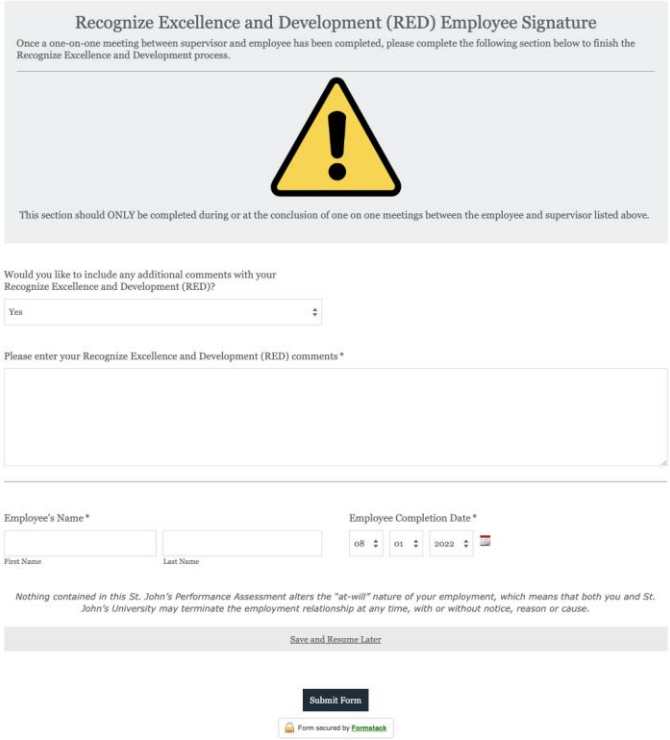
Logging into Formstack to Sign RED Form

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,

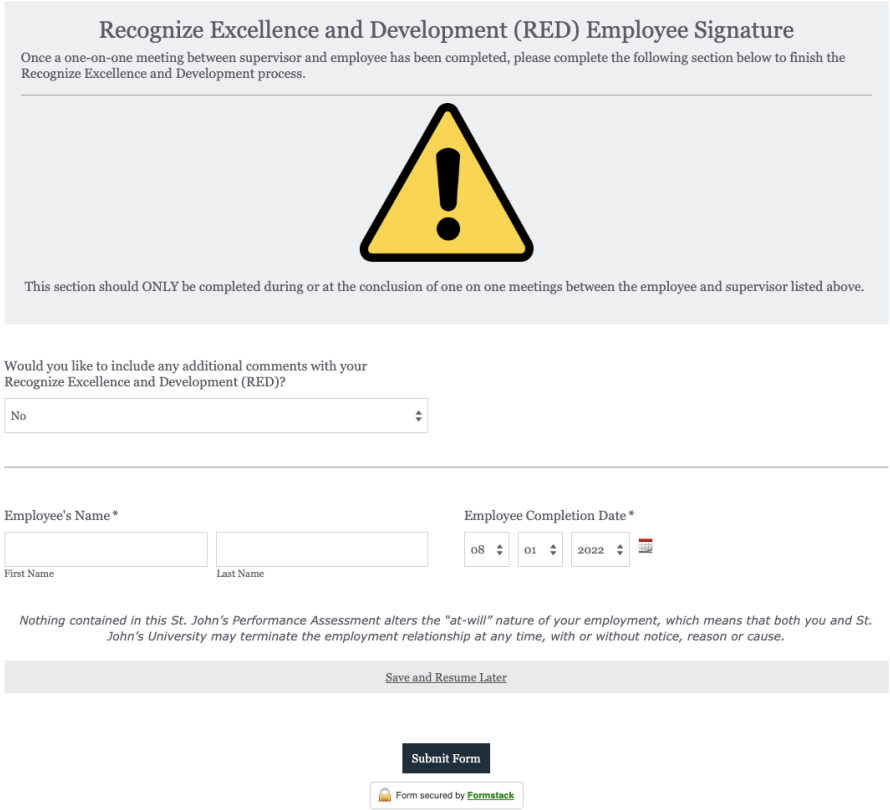
1. Select **Yes** in response to the question that asks for additional comments
2. Enter comments in the text box
3. Enter **First Name**, **Last Name**, **Date of Employee Completion (Signature)**
4. Click on **Submit Form**.



Logging into Formstack to Sign RED Form

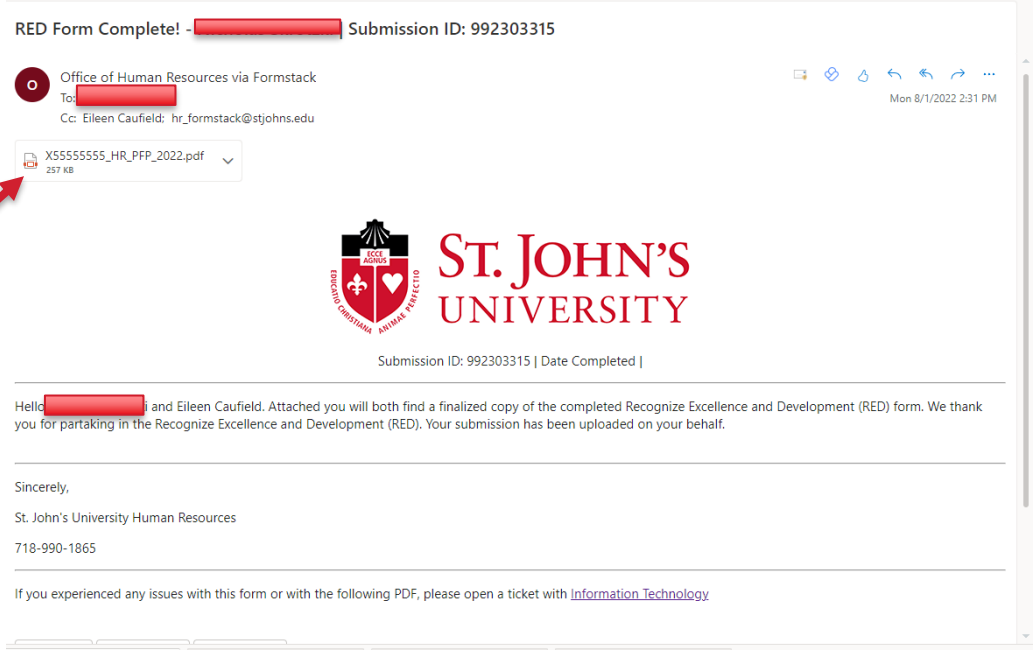
If you have no additional comments to make, select **No** in response to the question that asks if you would like to include additional comments,

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



Email Received Transmitting Final Copy of RED

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.



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 2:31 PM

X55555555_HR_PFP_2022.pdf
257 KB

ST. JOHN'S UNIVERSITY

Submission ID: 992303315 | Date Completed |

Hello [redacted] and Eileen Caufield. Attached you will both find a finalized copy of the completed Recognize Excellence and Development (RED) form. We thank you for partaking in the Recognize Excellence and Development (RED). Your submission has been uploaded on your behalf.

Sincerely,

St. John's University Human Resources

718-990-1865

If you experienced any issues with this form or with the following PDF, please open a ticket with Information Technology

Email Received Transmitting Final Copy of RED

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]
Title: Multimedia Engineer
Email: skrotzks@stjohns.edu
XNumber: X55555555
School or Department: Human Resources
Periodic Check In Date:

Supervisor's Name: Eileen Caufield
Title: Associate Director of Training
Email: caufiele@stjohns.edu

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+

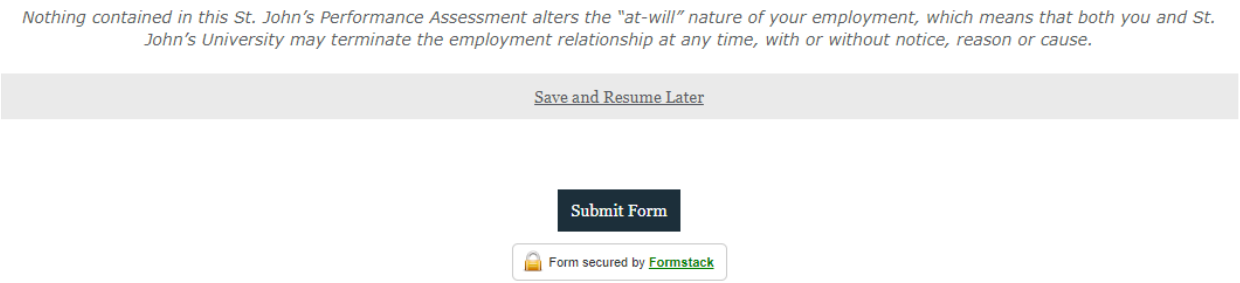
1 | Page

992303315 | X55555555

Saving the RED Form to Complete Later

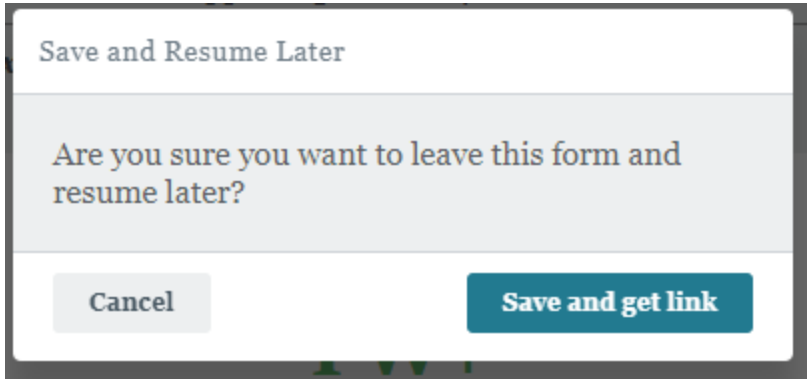
Important: Prepare and save your self-assessment in a Word document <u>before</u> copying and pasting into the Formstack RED Form.

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**.



Saving the RED Form to Complete Later

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



Saving the RED Form to Complete Later

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**.

ST. JOHN'S UNIVERSITY

Save and Resume Later

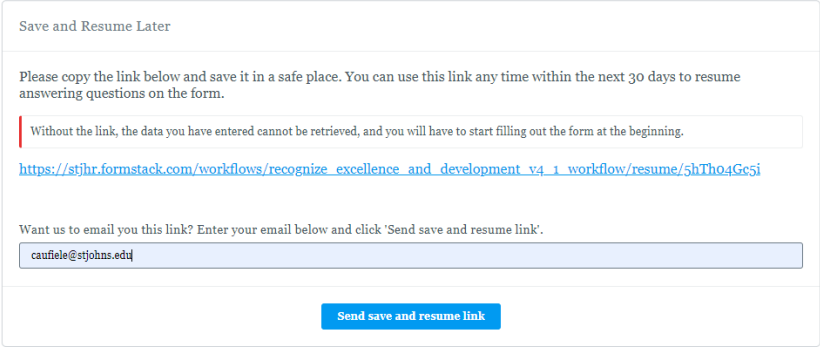
Great! We have sent your link to the supplied email address.

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/5hTh04Gc5i

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

caufiele@stjohns.edu

Send save and resume link

Saving the RED Form to Complete Later

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.

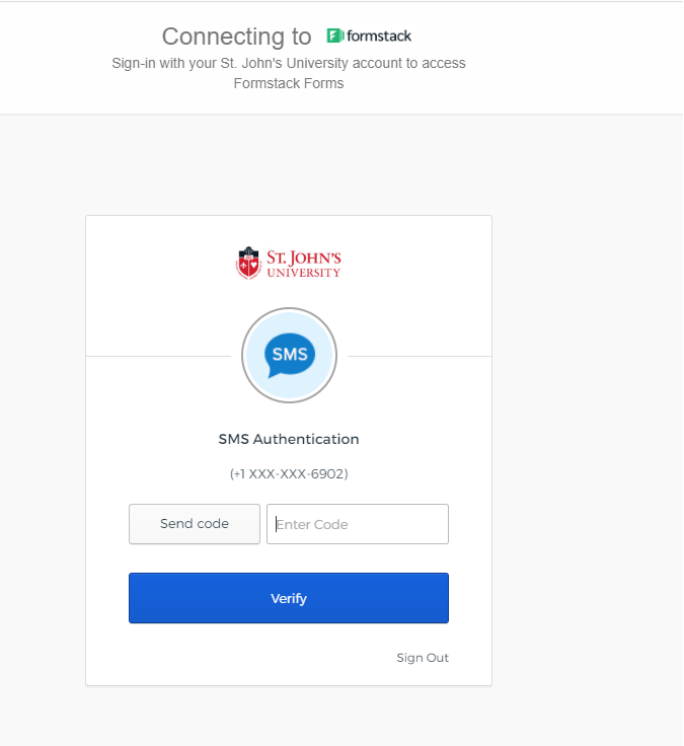
Without the link, the data you have entered cannot be retrieved, and you will have to start filling out the form at the beginning.

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

Thanks for saving your answers!

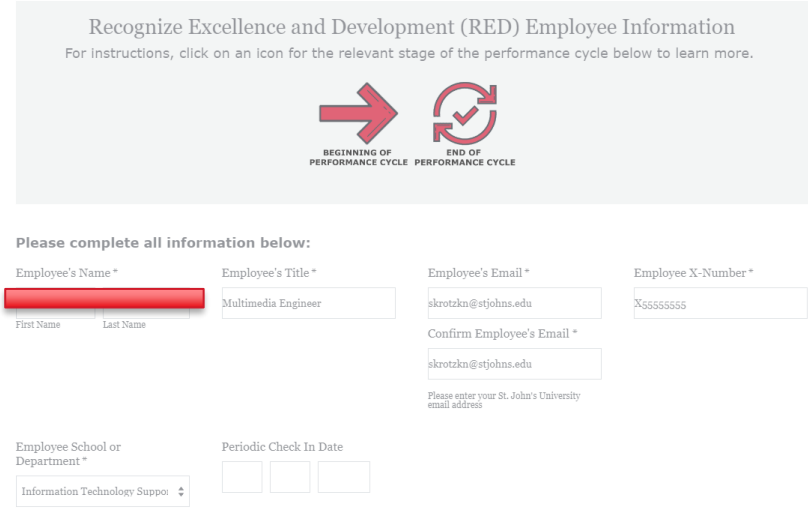
Saving the RED Form to Complete Later

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.**

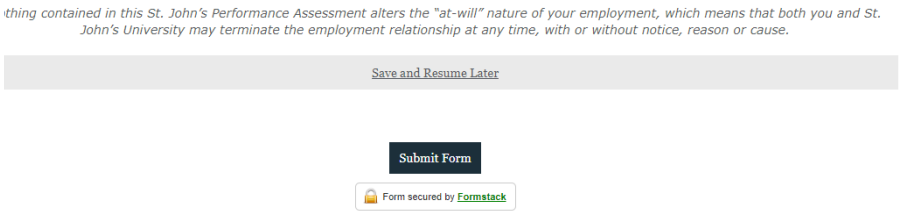


Saving the RED Form to Complete Later

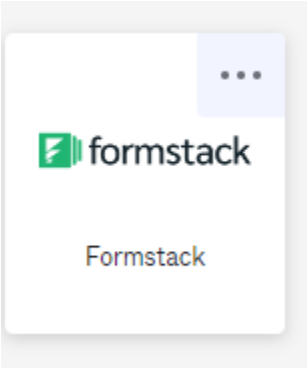
You will be brought to the partially completed RED Form.



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



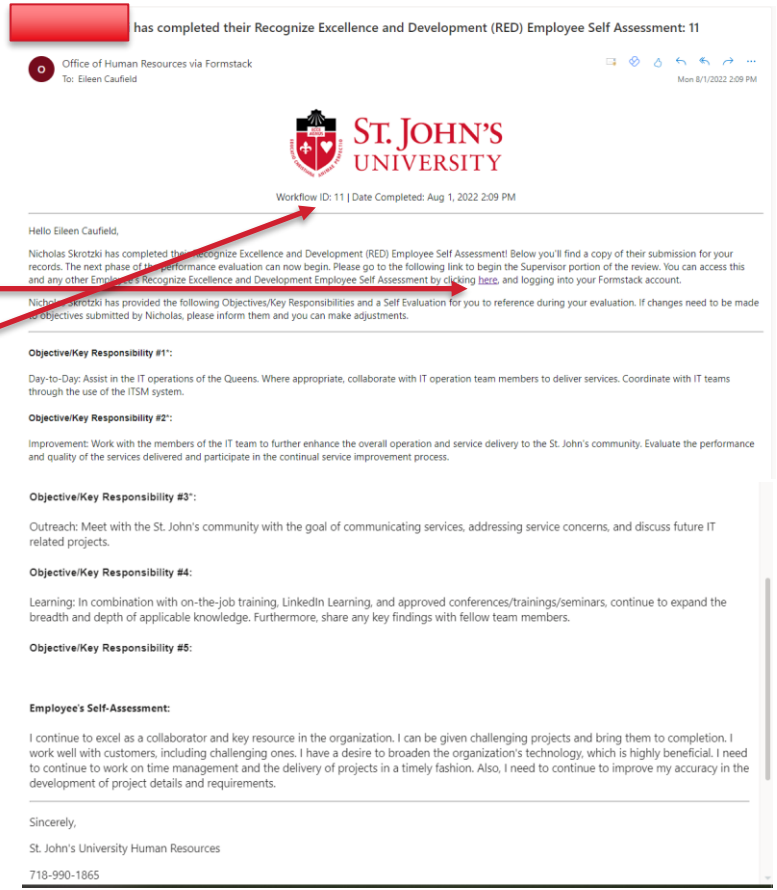
Using Formstack to Complete RED Forms for Direct Reports



Accessing Employee's RED Form via HR Email: Option #1 Click *Here*

When a direct report submits a completed self-assessment, you will receive an email from the Office of Human Resources informing you that a RED Form has been submitted. You can click on the word **here** in the email to login into your Formstack account.

Important: Note the **Workflow ID#** that appears in the email (#11 in the illustration). You will need to select this number in the Formstack Workspace to open-up the employee's RED Form. The employee's name will not appear in the Formstack Workspace, only the Workflow ID #.



has completed their Recognize Excellence and Development (RED) Employee Self Assessment: 11

Office of Human Resources via Formstack
To: Eileen Caufield
Mon 8/1/2022 2:09 PM

ST. JOHN'S UNIVERSITY

Workflow ID: 11 | Date Completed: Aug 1, 2022 2:09 PM

Hello Eileen Caufield,

Nicholas Skrotzki has completed their Recognize Excellence and Development (RED) Employee Self Assessment! Below you'll find a copy of their submission for your records. The next phase of the performance evaluation can now begin. Please go to the following link to begin the Supervisor portion of the review. You can access this and any other Employee's Recognize Excellence and Development Employee Self Assessment by clicking here, and logging into your Formstack account.

Nicholas Skrotzki has provided the following Objectives/Key Responsibilities and a Self Evaluation for you to reference during your evaluation. If changes need to be made to objectives submitted by Nicholas, please inform them and you can make adjustments.

Objective/Key Responsibility #1*:

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.

Objective/Key Responsibility #2*:

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.

Objective/Key Responsibility #3*:

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

Objective/Key Responsibility #4:

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.

Objective/Key Responsibility #5:

Employee's Self-Assessment:

I continue to excel as a collaborator and key resource in the organization. I can be given challenging projects and bring them to completion. I work well with customers, including challenging ones. I have a desire to broaden the organization's technology, which is highly beneficial. I need to continue to work on time management and the delivery of projects in a timely fashion. Also, I need to continue to improve my accuracy in the development of project details and requirements.

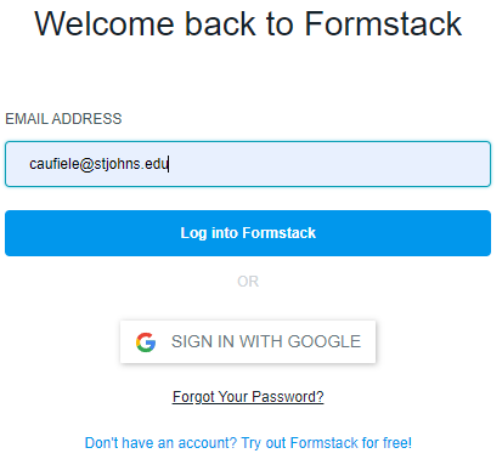
Sincerely,

St. John's University Human Resources

718-990-1865

Accessing Employee's RED Form via HR Email: Option #1 Click *Here*

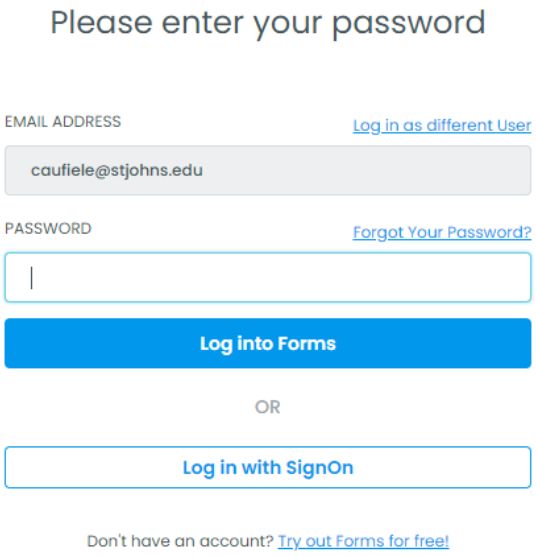
You will be brought to the login screen for Formstack. Enter your St. John's email address and click on **Log into Formstack.**



Accessing Employee's RED Form via HR Email: Option #1 Click *Here*

Select Log in with SignOn.

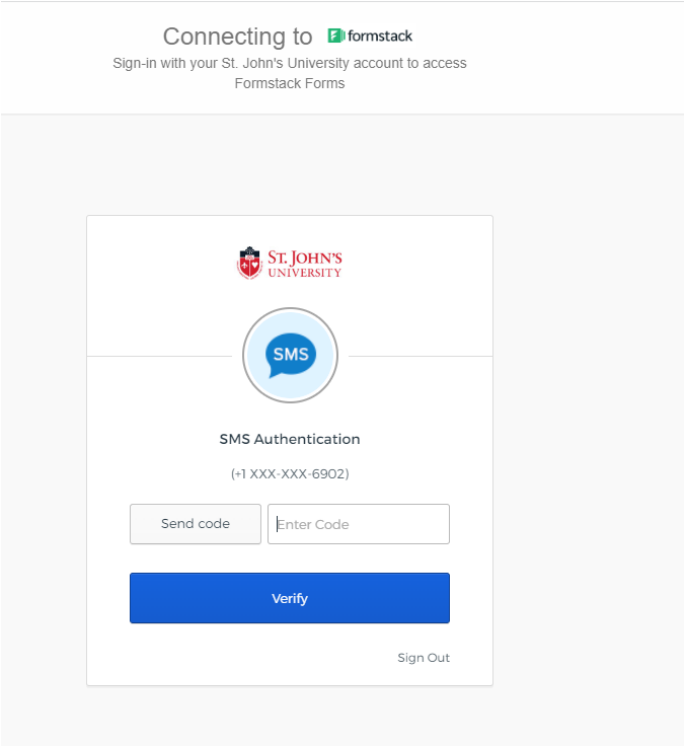
Note: If you are already signed in with your Okta sign-in, you will be brought to your Formstack Workspace. If you have not signed into Okta, you will be asked to enter your St. John's username and password.



Logging into Formstack to Sign RED Form

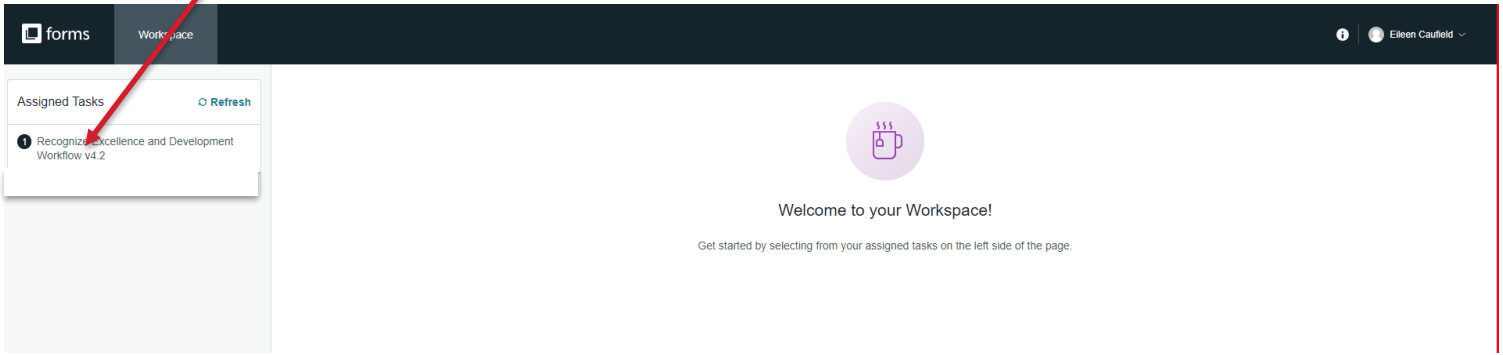
You will be asked to provide a two-factor authentication code in order to access the RED Form.

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



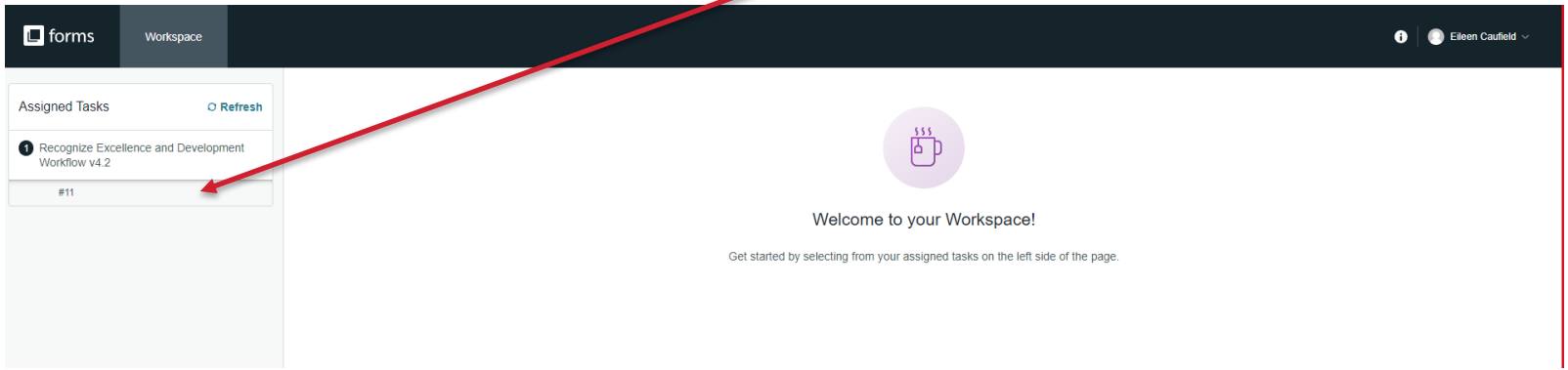
Accessing Employee's RED Form via HR Email: Option #1 Click *Here*

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



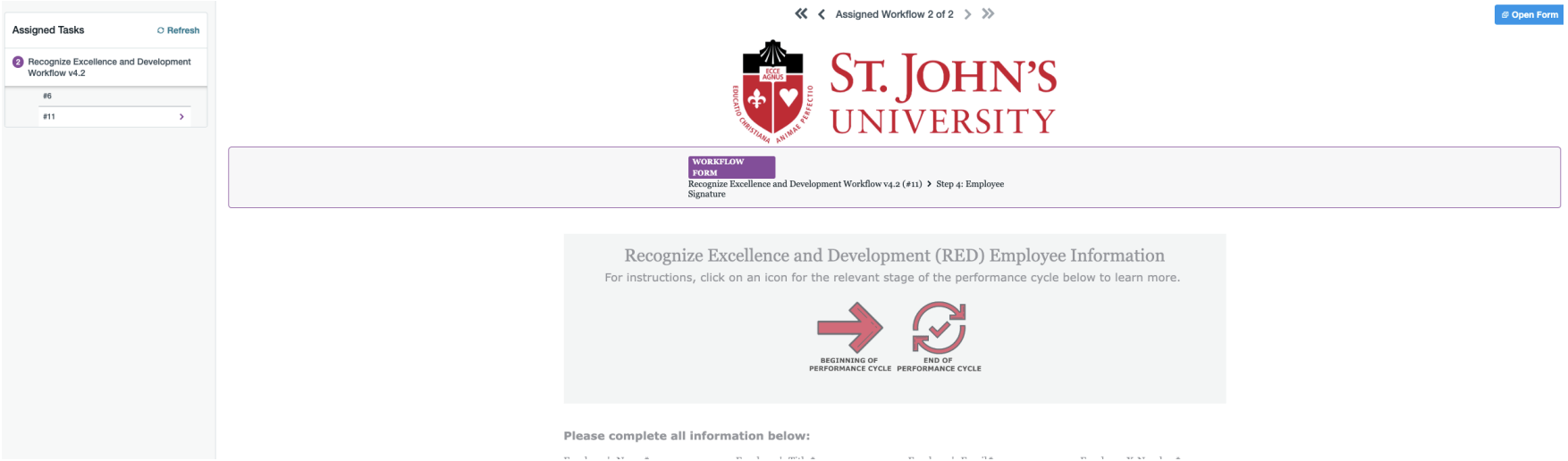
Accessing Employee's RED Form via HR Email: Option #1 Click *Here*

Click on the # **of the assessment** associated with the direct report that completed the RED Form. **Note:** Click on **#11** since that is the number of the workflow that was contained in the email from HR.



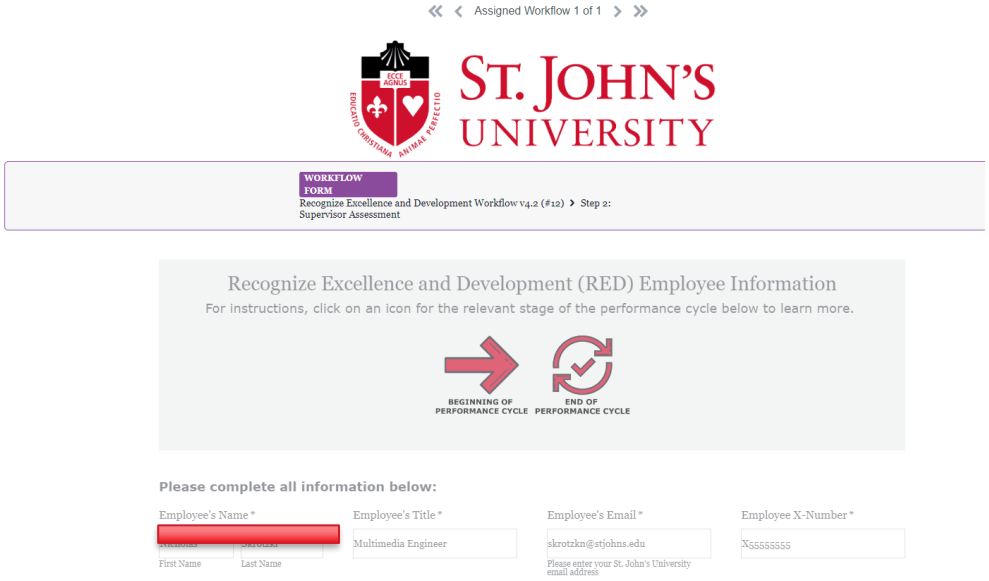
Accessing Employee's RED Form via HR Email: Option #1 Click *Here*

The RED Form for the direct report displays on the screen. Click on **Open Form** (upper right of the screen).



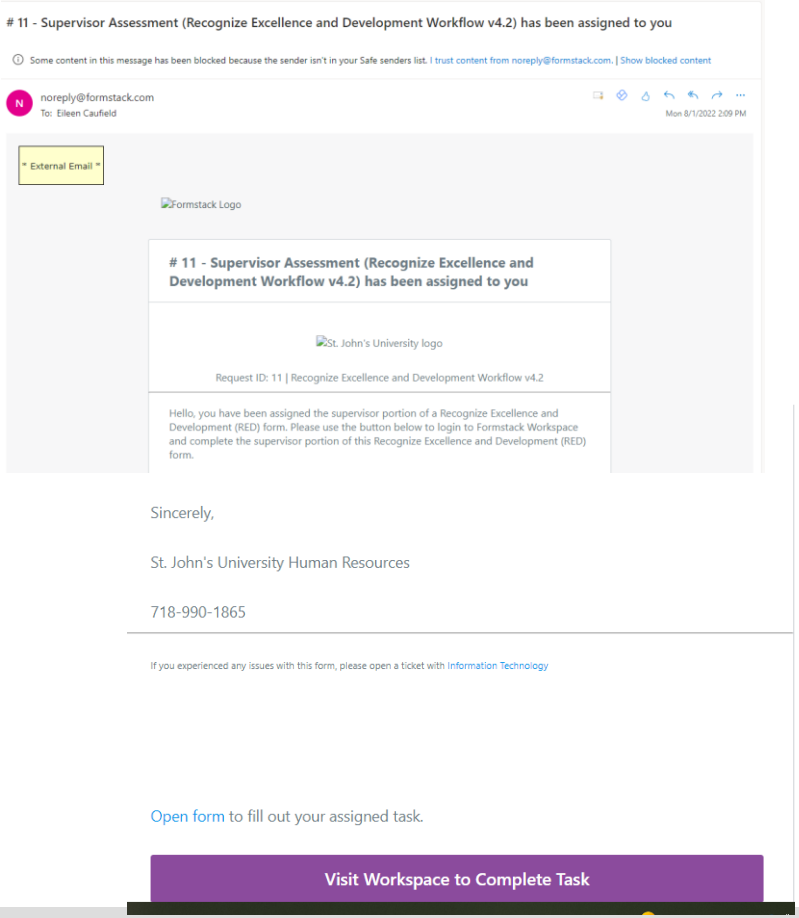
Accessing Employee's RED Form via HR Email: Option #1 Click *Here*

View the direct report's RED Form and scroll through the form to add your ratings and narrative. **Note**: The employee portion of the RED Form will appear grayed out. You cannot edit what the employee entered.



Accessing Employee's RED Form via Formstack Email: Option #2 Visit Workspace to Complete Task

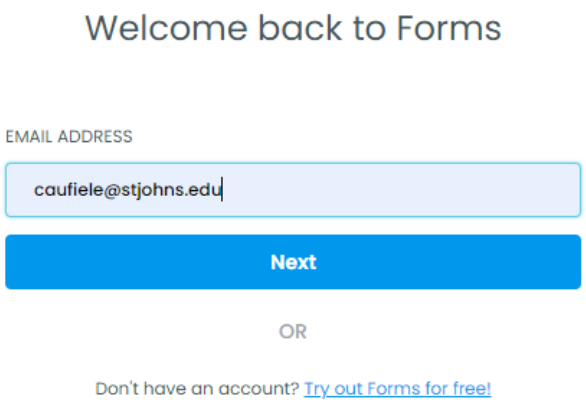
When a direct report submits a completed self-assessment, you will receive an email from Formstack notifying you that a RED Form has been assigned to you. However, **in the email from Formstack, the name of the direct report does not appear**. You can open the RED Form one of two ways: (1) Click on **Open Form** or (2) Click on **Visit Workspace to Complete Task**. The instructions on the following slides are for **Visit Workspace to Complete Task**, which is an easier way to access the form than the Open Form option.



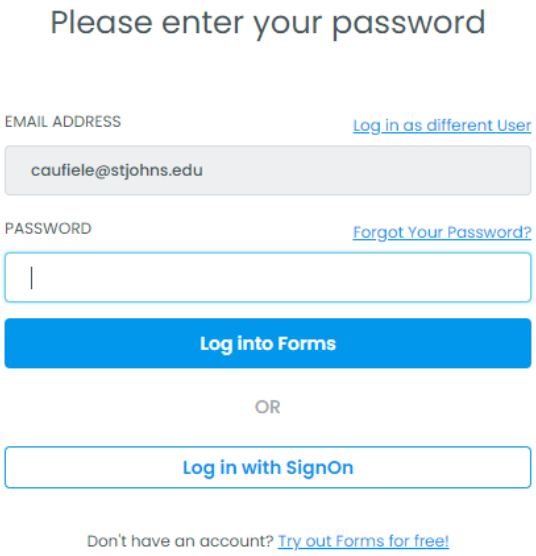
Note: #11 in the red box indicates the number Formstack assigned to the direct report who completed the form. This number corresponds to the number of the assessment that has been assigned to you.

Accessing Employee's RED Form via Formstack Email: Option #2
Visit Workspace to Complete Task

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



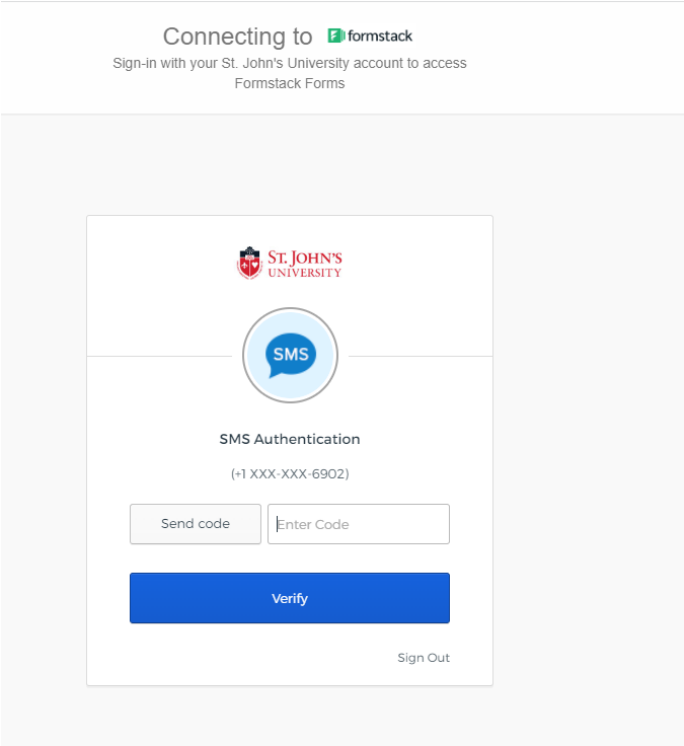
Click on **Log in with SignOn**.



Accessing Employee's RED Form via Formstack Email: Option #2
Visit Workspace to Complete Task

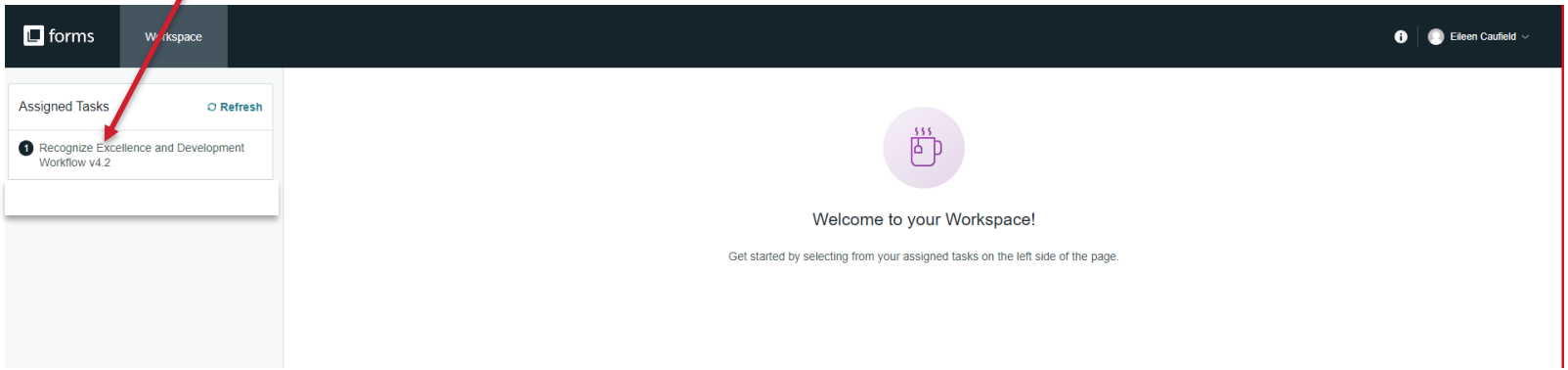
You will be asked to provide a two-factor authentication code in order to access the RED Form.

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



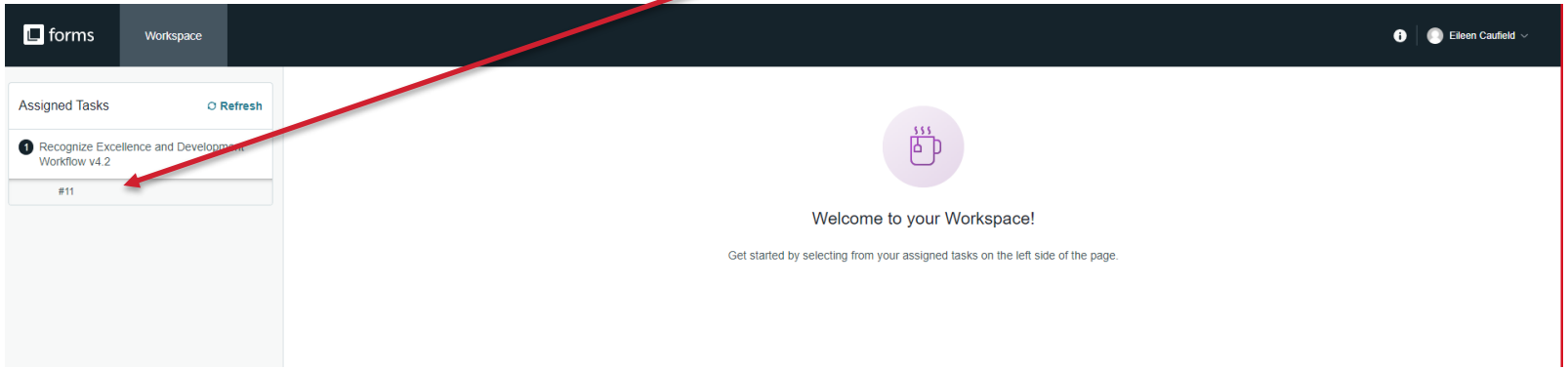
Accessing Employee's RED Form via Formstack Email: Option #2 Visit Workspace to Complete Task

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



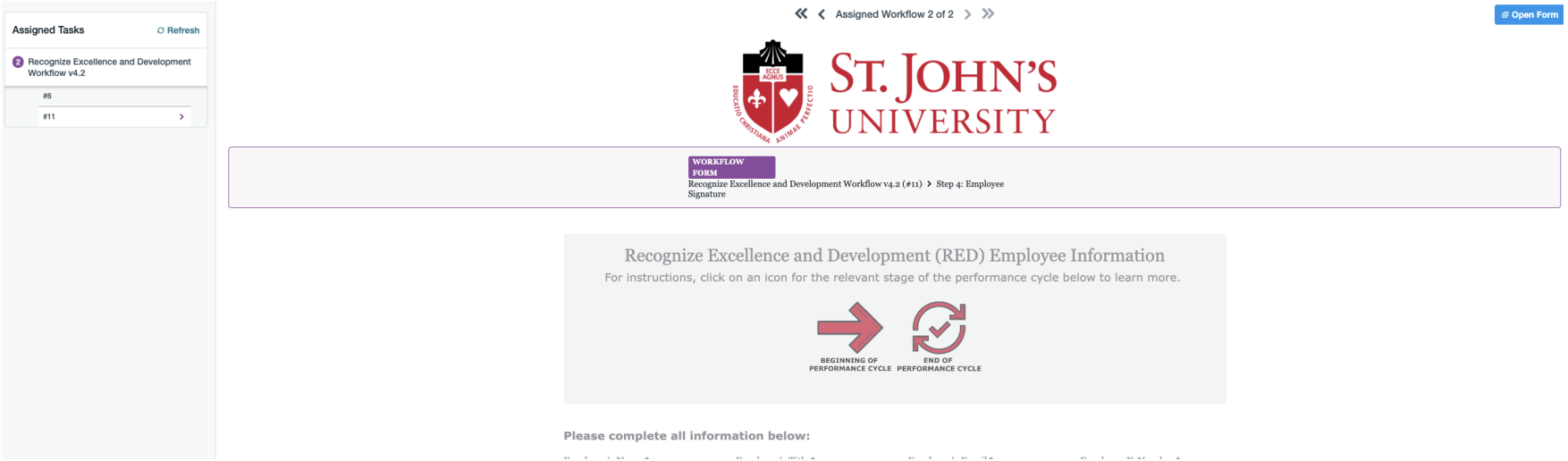
Accessing Employee's RED Form via Formstack Email: Option #2 Visit Workspace to Complete Task

Click on the # **of the assessment** associated with the direct report that completed the RED Form. **Note:** Click on **#11** since that is the number of the workflow and request ID# that was contained in the email from Formstack.



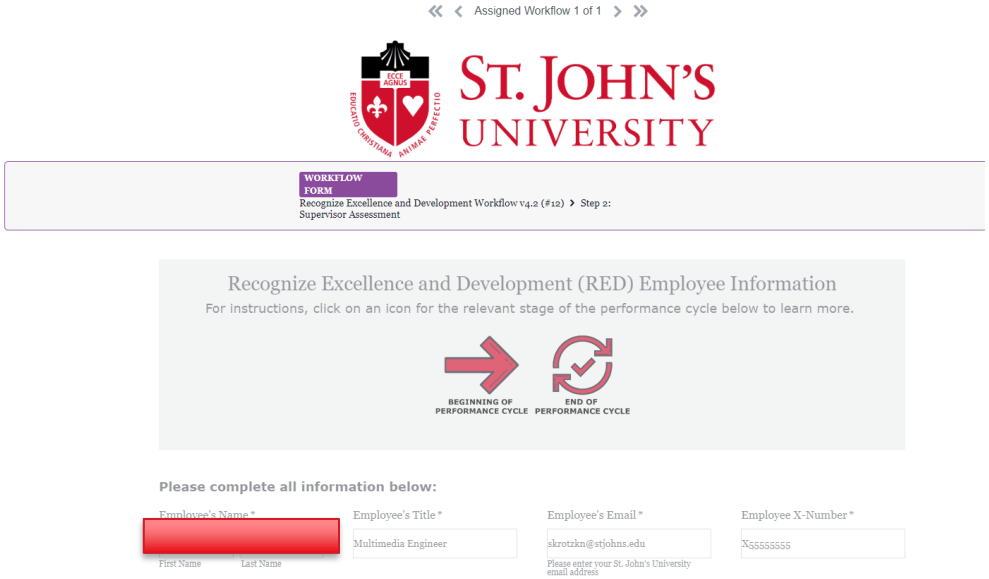
Accessing Employee's RED Form via Formstack Email: Option #2 Visit Workspace to Complete Task

The RED Form for the direct report displays on the screen. Click on **Open Form** (upper right of the screen).



Accessing Employee's RED Form via Formstack Email: Option #2 Visit Workspace to Complete Task

View the direct report's RED Form and scroll through the form to add your ratings and narrative. **Note**: The employee portion of the RED Form will appear grayed out. You cannot edit what the employee entered.



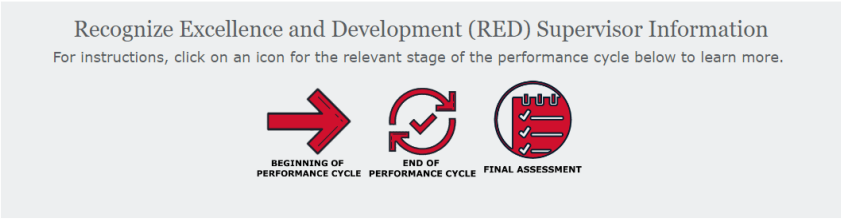
Completing the RED Form for a Direct Report

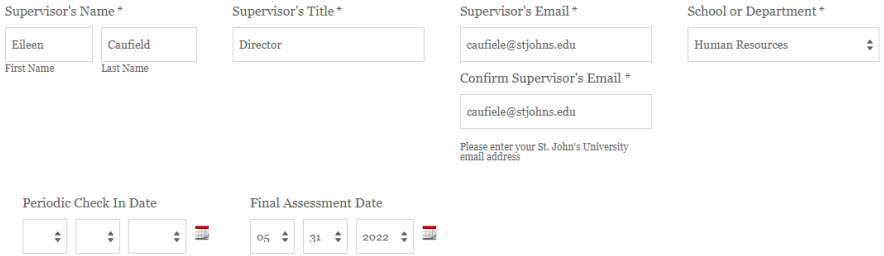
Adding Supervisor's Personal Information

On the direct report's RED Form, you will be asked to enter your personal information, that is, your

- first and last name,
- your position title,
- your email address (you will be asked to confirm your email address)
- department.
- date of the assessment, for the year-end assessment enter 05/31/yyyy.

Note: If you click on the images for the **Beginning of Performance Cycle**, **End of Performance Cycle** and **Final Assessment**, you will be brought to the instructions for each of those phases.

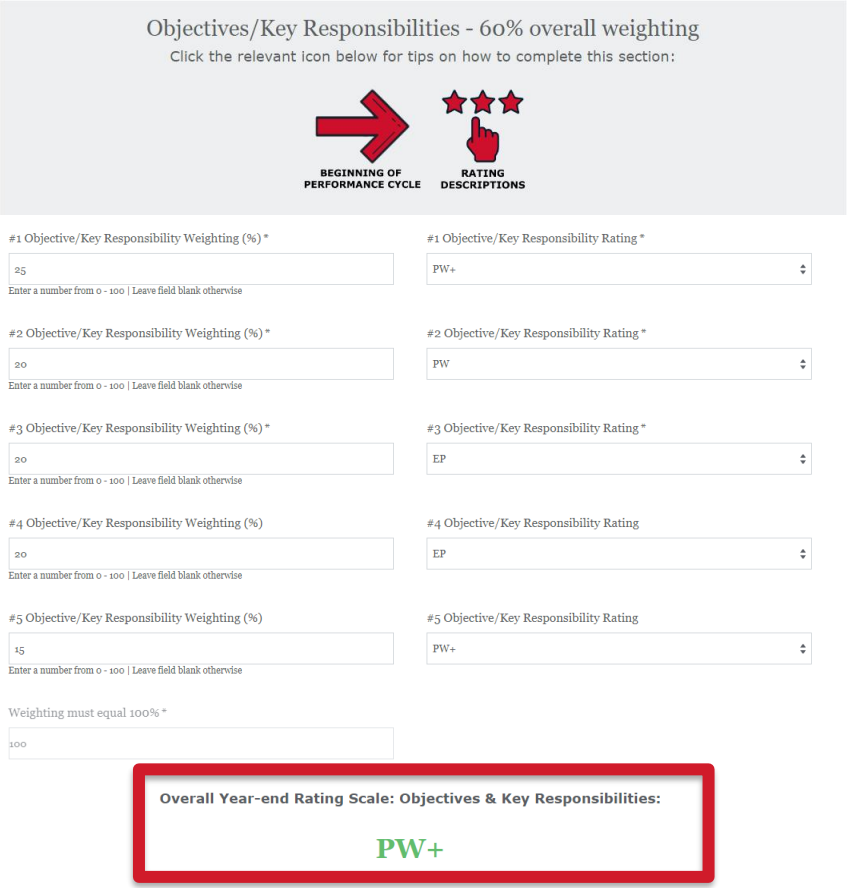




Entering Objectives Weighting & Rating

For each of your direct report's objectives, enter the weighting of the objective and your rating on it. **Note:** The weighting must equal 100%.

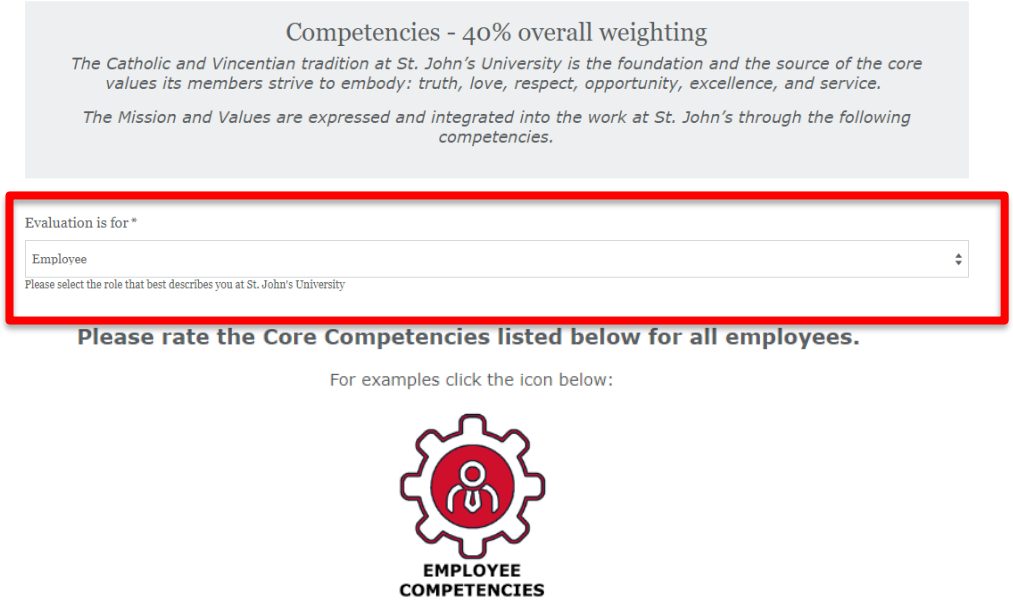
Reminder: The system will automatically assign a rating based on the weight of the objective and the rating.



Note: If you click on the images for the **Beginning of Performance Cycle** and **Rating Descriptions**, you will be brought to the instructions for each of those phases.

Completing the Competency Section

For the competency section, you must identify if the direct report is an employee or supervisor. Why? There are different sets of competencies for employees and supervisors.



Note: Click on **Employee Competencies** for a description of each of the competencies.

Completing the Competency Section

Enter the rating for each competency. The system will automatically assign an overall rating for the competency section based on your rating on each competency.

1. Provide Timely and Excellent Service:

Please select a rating for Timely and Excellent Service: *

EP

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.

Please select a rating for Diversity and Inclusivity: *

PW+

3. Shared Ownership/Accountability:

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

Please select a rating for Shared Ownership/Accountability *

PW+

4. Adapting to Change:

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

Please select a rating for Adapting to Change *

PW

5. Collegiality and Teamwork:

Works collaboratively and respectfully within and across departments.

Please select a rating for Collegiality and Teamwork *

PW

6. Communication:

Communicates clearly, concisely, and respectfully in all interactions.

Please select a rating for Communication *

PW+

7. Quality of Work:

Provides accurate complete products and services

Please select a rating for Quality of Work *

PW+

Overall Year-end Rating Scale: Competencies / St. John's mission and values at work:

PW+

Overall Rating

The **Final Rating** for both the objective and competency sections is automatically calculated by Formstack.

Overall Performance Rating: Year-End Assesment

EP	Exceptional Performance (requires written supporting rationale)
PW+	Performs well in all aspects of the job; exceeds expectations in a few areas (requires written supporting rationale)
PW	Performs well in all aspects of the job
NI	Needs Improvement (requires written supporting rationale)
DNW	Does not meet expectations (requires written supporting rationale)

Comments required for each rating except PW

Final Rating:

PW+

Professional Development Plan

Purpose: To provide employees with an opportunity for professional growth and to assist those who may be struggling with recommendations for ways to develop needed skills and knowledge.

Note: Click on the **Professional Development** icon to access a description of the Professional Development Plan and its purpose.

Professional Development Plan

On the direct reports' RED Form, enter if the employee completed their Professional Development Plan. Verify that the employee completed the actions within the time frame identified. Also, think of additional development opportunities to add to the employee's RED Form for the next year.

Professional Development Plan

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

Skills/knowledge/abilities to be developed (or improved)	Action steps/Timeframe	Results/Actions taken
Learn to perform a V Lookup to better compare data sets between 2 Excel workbooks.	Complete a LinkedIn Learning course on performing V Lookups in Excel by May 31, 2022.	Completed LinkedIn Learning Excel 2016 course on February 22, 2022.
Improve communications with team members.	Complete the University's workshops on Communication Skills Modules I and II and complete LinkedIn Learning course on improving oral communications.	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.

Note: The employee will provide you with information on the development plan completed.

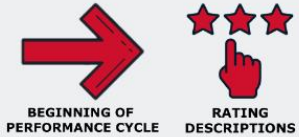
Supervisor's Summary

Supervisors must provide a narrative for any objective or competency rating <u>other than a PW</u> rating. Supervisors must justify a rating of EP, PW+, NI, DNM. However, it is recommended that supervisors address each objective and competency.

Note: Click on the **Rating Descriptions** for a description of the ratings and behavioral descriptors associated with each rating.

Objectives/Key Responsibilities - 60% overall weighting

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



Supervisor's Summary

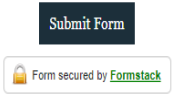
Objective #1 - Nick did an excellent job this past year of completing his day-to-day tasks with his IT Team colleagues. He effectively used the ITSM system to increase his work performance. Nick's completion of job tasks increased by 20% over the previous year.

Objective #3 - Nick did an outstanding job with outreach to clients during the past year. For all of his projects, Nick developed, in collaboration with the clients, an implementation plan for the projects. Nick's thorough planning resulted in completion of all his projects on time and under budget. On 3 of his 4 major projects, I received written communication from the clients complimenting Nick on a job well done.

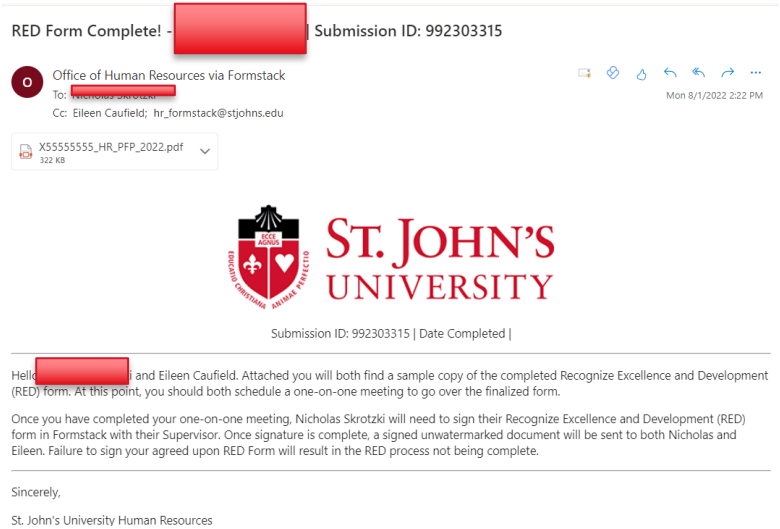
Competencies
Provide Timely and Excellent Service - Nick has met all his project deadlines during the past year without sacrificing quality. The feedback received from the clients attest to Nick's timeliness with responses, concern for client's satisfaction with the work product and overall attentiveness to client needs.

Supervisor's Summary

Upon completion of the Supervisor's Summary, click **Submit Form.**



Formstack sends you and your direct report an email that the Supervisor submitted their ratings and narrative to the employee. Both receive a **sample** copy of the RED Form. You are required to schedule a meeting with your direct report to discuss 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

X55555555_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.

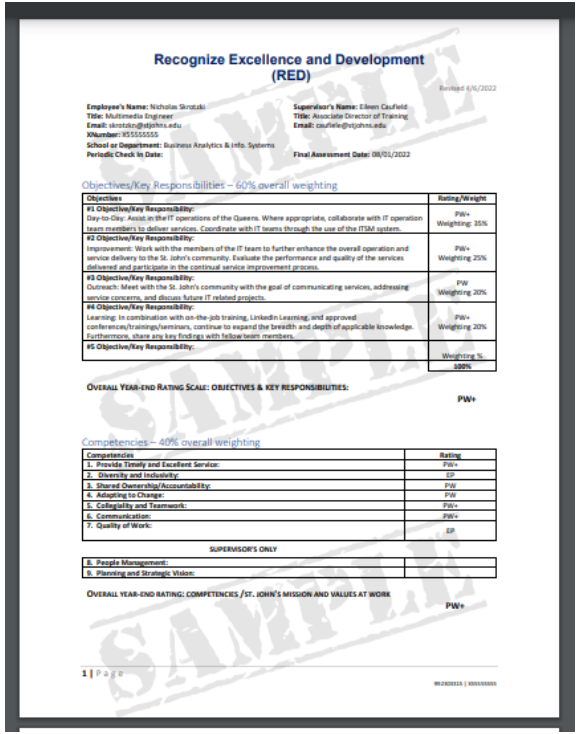
Once you have completed your one-on-one meeting, Nicholas Skrotzki will need to sign their Recognize Excellence and Development (RED) form in Formstack with their Supervisor. Once signature is complete, a signed unwatermarked document will be sent to both Nicholas and Eileen. Failure to sign your agreed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

Sincerely,

St. John's University Human Resources

Sample Copy of RED after Supervisor submit summary

Formstack sends you and your direct report an email that you, their supervisor, submitted their ratings and narrative to the employee. Both receive a **sample** copy of the RED Form. You are required to schedule a meeting with your direct report to discuss the RED Form.



Recognize Excellence and Development (RED)

Revised 4/6/2022

Employee's Name: Nicholas Skrotzki
Title: Multimedia Engineer
Email: skrotzki@stjohns.edu
XNumber: XSSSSSSSS
School or Department: Business Analytics & Info. Systems
Periodic Check In Date:

Supervisor's Name: Eileen Caufield
Title: Associate Director of Training
Email: caufield@stjohns.edu
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:	

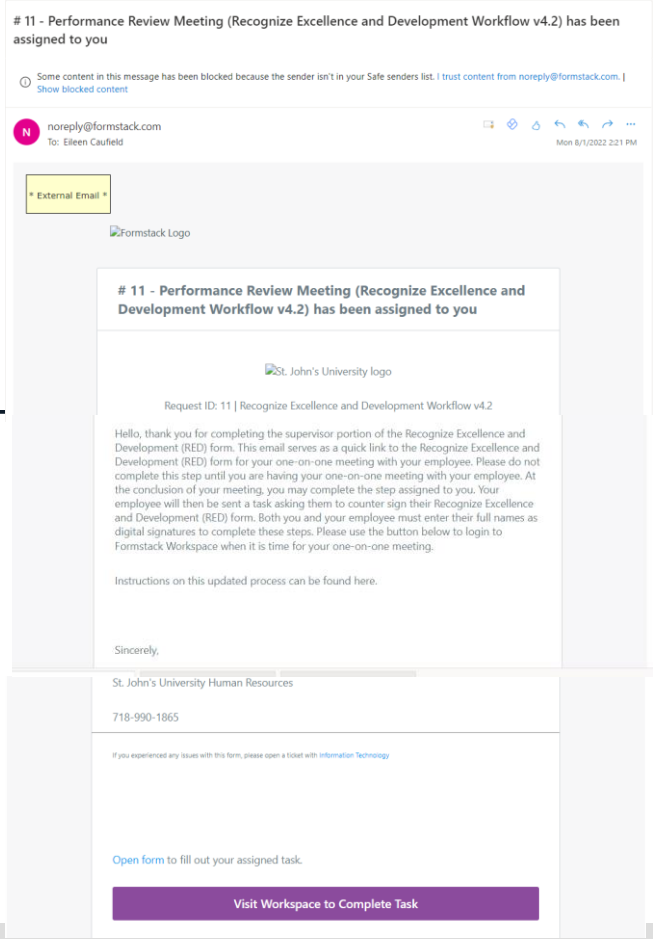
Overall Year-end Rating: Competencies /St. John's Mission and Values at Work: PW+

1 | Page

99-2020115 | XSSSSSSSS

Notice that a Review Meeting has been assigned

After the supervisor submits the RED Form to the employee, Formstack sends to the supervisor an email notifying them that they have an additional workflow to complete (one-on-one meeting with employee).**The workflow will remain opened until both the supervisor & employee sign the RED Form.**



11 - Performance Review Meeting (Recognize Excellence and Development Workflow v4.2) has been assigned to you

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

noreply@formstack.com
To: Eileen Caufield
Mon 8/1/2022 2:21 PM

* External Email *

Formstack Logo

 # 11 - Performance Review Meeting (Recognize Excellence and Development Workflow v4.2) has been assigned to you

St. John's University logo

Request ID: 11 | Recognize Excellence and Development Workflow v4.2

Hello, thank you for completing the supervisor portion of the Recognize Excellence and Development (RED) form. This email serves as a quick link to the Recognize Excellence and Development (RED) form for your one-on-one meeting with your employee. Please do not complete this step until you are having your one-on-one meeting with your employee. At the conclusion of your meeting, you may complete the step assigned to you. Your employee will then be sent a task asking them to counter sign their Recognize Excellence and Development (RED) form. Both you and your employee must enter their full names as digital signatures to complete these steps. Please use the button below to login to Formstack Workspace when it is time for your one-on-one meeting.

Instructions on this updated process can be found here.

Sincerely,

St. John's University Human Resources

718-990-1865

If you experienced any issues with this form, please open a ticket with Information Technology

Open form to fill out your assigned task.

Visit Workspace to Complete Task

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

Note: One can access the **Workspace** by clicking on the **Formstack** tile from the dashboard.

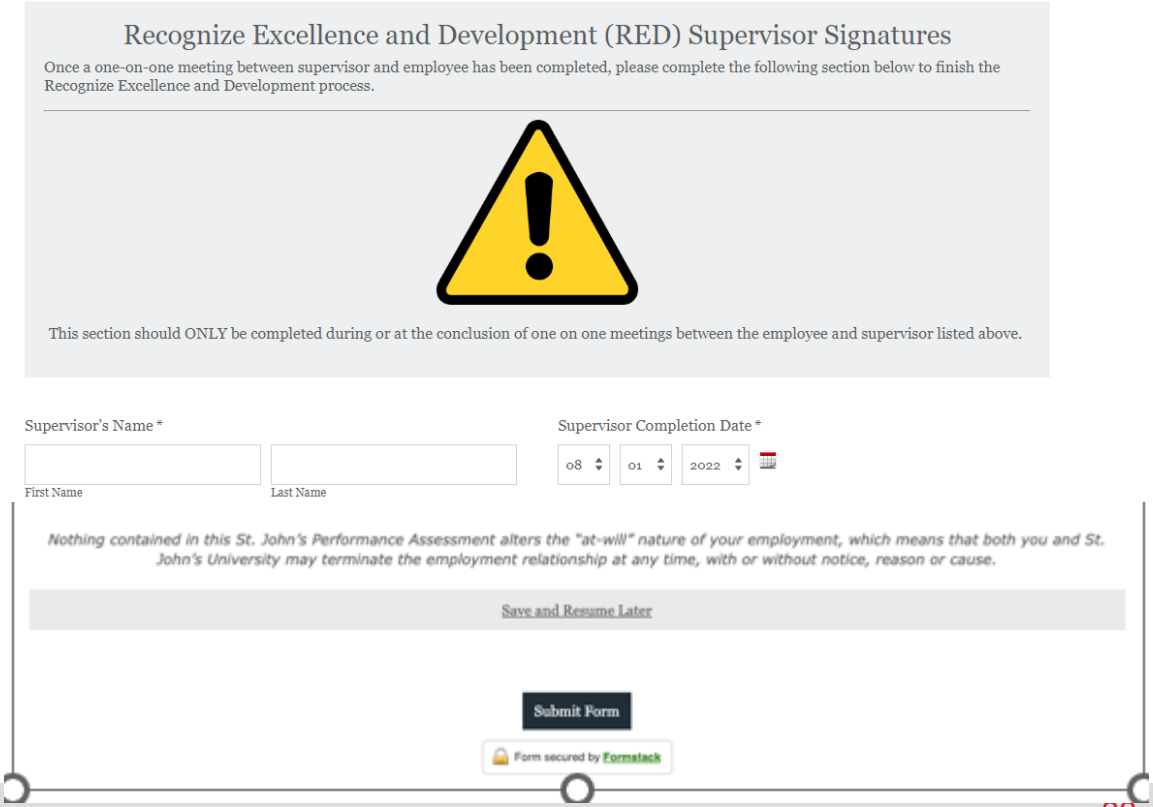
Log into Formstack and access the Workflow ID# (11) assigned to the direct report.

After Review Meeting has been held – Supervisor Signature Required

After the supervisor and employee conduct the one-on-one review meeting, the supervisor should access the **Formstack Workspace** to sign the employee's RED Form.

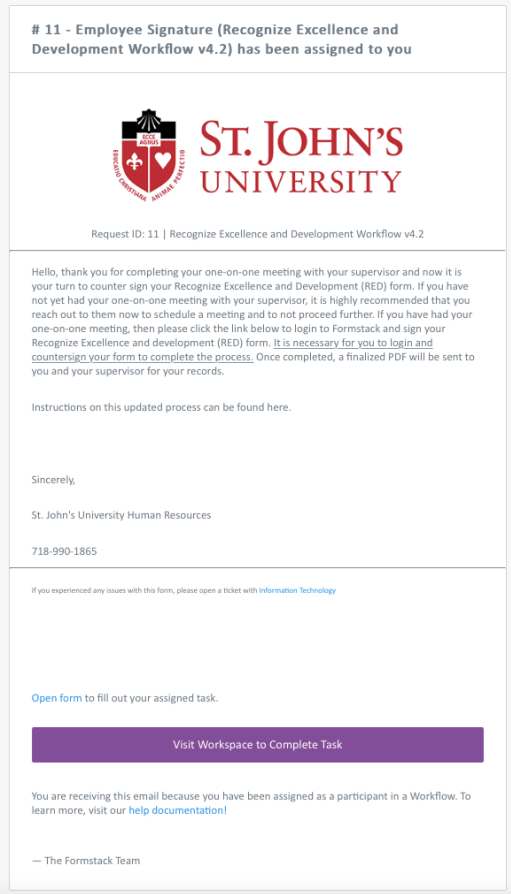
Supervisor enters their **First Name**, **Last Name** and **Date** when the meeting with employee was conducted.

Click on **Submit Form**.



After Review Meeting has been held – Employee Signature Required

After the supervisor signs the employee's RED Form, the **employee** receives a workflow assignment requesting their signature on the RED.



 # 11 - Employee Signature (Recognize Excellence and Development Workflow v4.2) has been assigned to you

ST. JOHN'S UNIVERSITY

Request ID: 11 | Recognize Excellence and Development Workflow v4.2

Hello, thank you for completing your one-on-one meeting with your supervisor and now it is your turn to counter sign your Recognize Excellence and Development (RED) form. If you have not yet had your one-on-one meeting with your supervisor, it is highly recommended that you reach out to them now to schedule a meeting and to not proceed further. If you have had your one-on-one meeting, then please click the link below to login to Formstack and sign your Recognize Excellence and development (RED) form. It is necessary for you to login and countersign your form to complete the process. Once completed, a finalized PDF will be sent to you and your supervisor for your records.

Instructions on this updated process can be found here.

Sincerely,

St. John's University Human Resources

718-990-1865

If you experienced any issues with this form, please open a ticket with Information Technology

Open form to fill out your assigned task.

Visit Workspace to Complete Task

You are receiving this email because you have been assigned as a participant in a Workflow. To learn more, visit our help documentation!

— The Formstack Team

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

Note: One can access the **Workspace** by clicking on the **Formstack** tile from the dashboard.

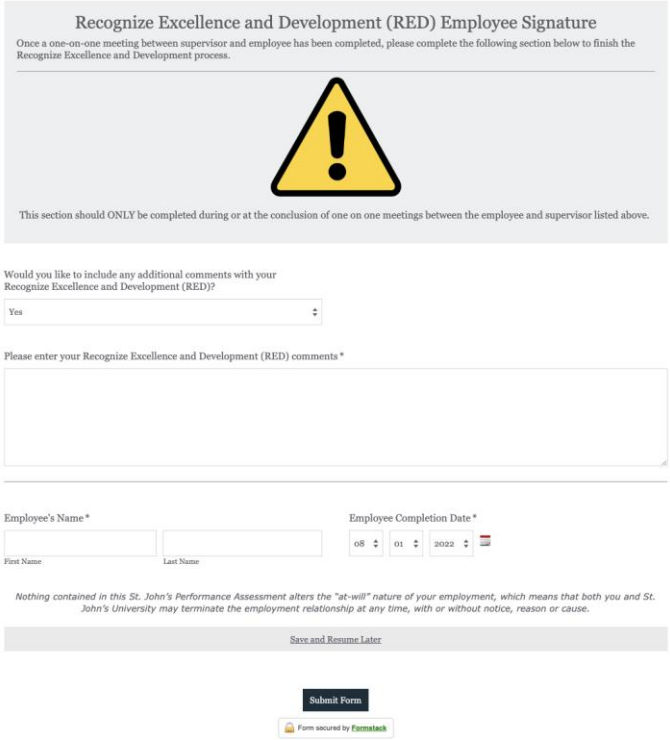
After Review Meeting has been held – Employee Signature Required

After the employee receives the email that the supervisor signed the RED Form, the employee is asked to sign the form.

Note: At this point the employee has the option to enter additional comments if they do not agree with the supervisor's comments or wish to provide additional explanations in response to supervisor's comments.

If employee wishes to add comments,

1. Select **Yes** in response to the question that asks for additional comments
2. Enter comments
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

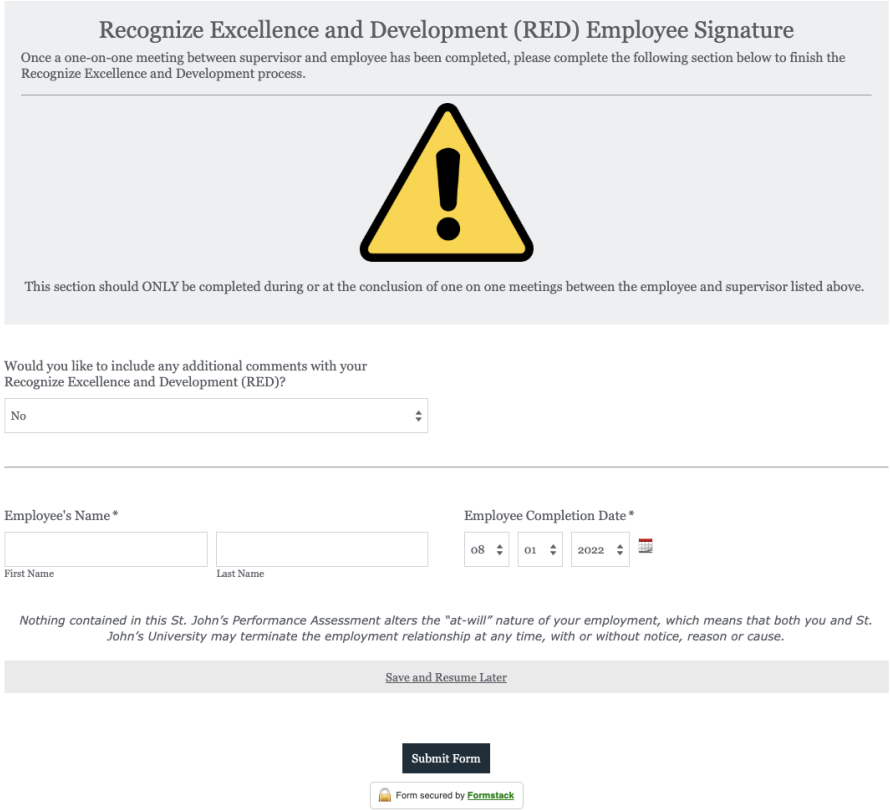
Submit Form

Form secured by Formstack

After Review Meeting has been held – Employee Signature Required

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

1. Employee enters **First Name**, **Last Name**, and **Date** when employee completes 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)?

No

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.

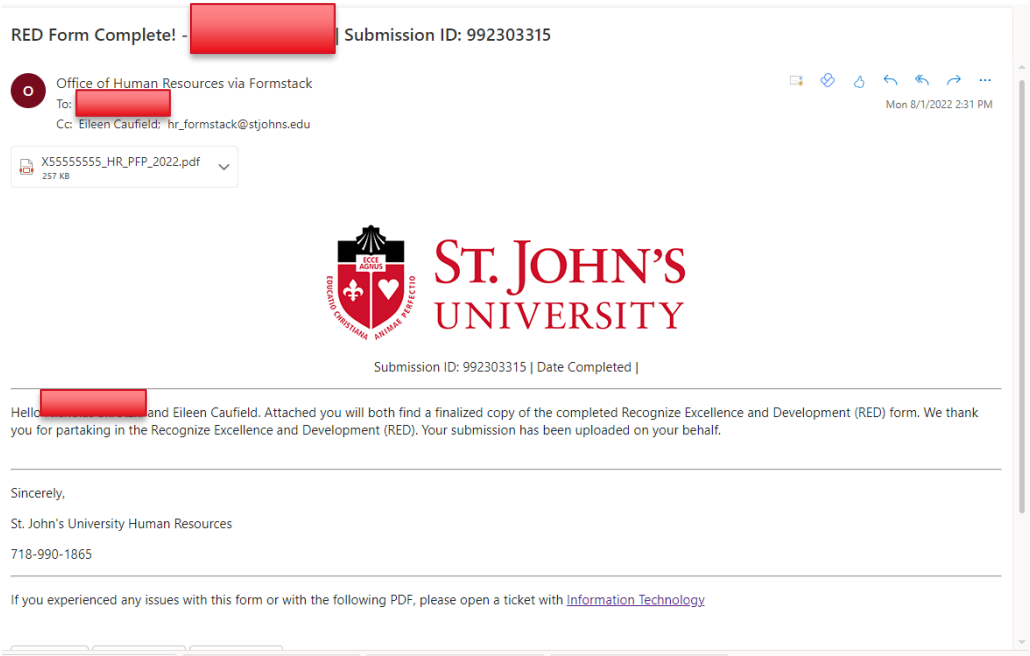
Save and Resume Later

Submit Form

Form secured by Formstack

Email Received Transmitting Final Copy of RED

After the employee signs and submits the RED Form, Formstack sends to both the supervisor and the employee an email notifying them that the process has been completed and transmits a final copy of the RED.



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 2:31 PM

X55555555_HR_PFP_2022.pdf
257 KB

ST. JOHN'S UNIVERSITY

Submission ID: 992303315 | Date Completed |

Hello [redacted] and Eileen Caufield. Attached you will both find a finalized copy of the completed Recognize Excellence and Development (RED) form. We thank you for partaking in the Recognize Excellence and Development (RED). Your submission has been uploaded on your behalf.

Sincerely,

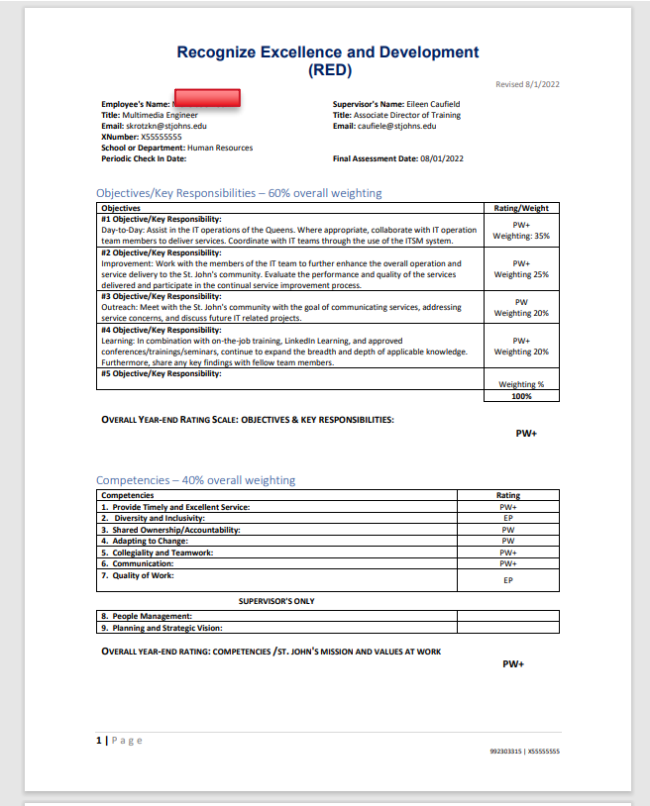
St. John's University Human Resources

718-990-1865

If you experienced any issues with this form or with the following PDF, please open a ticket with Information Technology

Email Received Transmitting Final Copy of RED

After the employee signs and submits the RED Form, 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]
Title: Multimedia Engineer
Email: skrotzkn@stjohns.edu
XNumber: X55555555
School or Department: Human Resources
Periodic Check In Date:

Supervisor's Name: Eileen Caufield
Title: Associate Director of Training
Email: caufiele@stjohns.edu

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

992303315 | X55555555

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