

SUPERVISOR FINAL ASSESSMENT

Assessment stage

At the end of the performance cycle, the supervisor provides each employee with an overall assessment of the employee's performance for the year in each of the sections: objectives and key responsibilities; competencies and mission and values at work; and development plan. A complete assessment will consist of written comments, an evaluative rating for each section, an overall rating and the date.

Comments Instructions:

Written comments are required for all ratings except PW. Supervisors are encouraged to write comments for PW ratings as well. In the "Manager's Summary" section of the RED form, the supervisor should include comments noting aspects of the job that were done well and areas that need improvement, as necessary. ***Supervisors may be asked to further substantiate all ratings other than PW.***

Section Overall ratings will automatically calculate based on the ratings and weightings of each individual objective or competency. An overall section or assessment rating of NI or DNM requires creation of a performance improvement plan in alignment with the University's Corrective Action policy. (See [policy 702](#))

Rating Instructions:

Ratings are required for each section of the form: *Exceptional Performance, Performing Well Plus, Performing Well, Needs Improvement, Does Not Meet Expectations, and Not Applicable*. Section and overall ratings will automatically calculate. Click [here](#) to see additional rating definitions.

Objectives/Key Responsibilities – 60% overall weighting

Assess how effectively the employee achieved each objective/job responsibility and select the appropriate rating. Comments should include specific examples and be written in the *Overall Performance Rating: Year-End Assessment* section in the *Manager's Summary* section. An overall section rating will automatically calculate the final section rating factoring in the 60% overall weighting for the objectives/key responsibilities.

Competencies & SJU Values at Work – 40% overall weighting

Competencies and Mission/SJU Values at Work are weighted equally. Assess how effectively the employee demonstrated each competency and rate each competency individually. In the *Overall Performance Rating: Year-End Assessment* section in the *Manager's Summary* section, write specific examples of how well each competency was demonstrated throughout the cycle including specific examples. An overall section rating will automatically calculate factoring in the 40% overall weighting. **Written comments are required for all ratings except PW.** All managers' comments are written in the *Manager's Summary* section of the RED form. **Note:** *For an individual to achieve an EP rating for competencies, the employee's overall rating in the Objective/Key Responsibility section must be Performing Well (PW) or higher.*

Professional development plan

Assess how well the employee met or exceeded the development plan by writing comments in the Results/Actions taken box.

Overall Performance Rating: Year-End Assessment

The final overall rating will automatically calculate based on the section ratings of the objectives/key

responsibilities and the competencies/SJU Values at Work sections. The ratings for the objectives/key responsibilities (60%) and the competencies (40%) will be used to calculate the final rating.

Write final comments in the *Overall Performance Rating: Year-End Assessment* section in the *Manager's Summary* section and submit the RED form.

Signatures

Once the supervisor submits the RED form, both supervisor and employee receive a Sample copy of the form via email. The supervisor is assigned an additional workflow assignment to conduct the one-on-one meeting. After the one-on-one meetings are held, the supervisor signs the RED form. Once the supervisor signs and submits the form (to the employee), the employee receives a workflow task to also sign off on the RED with or without additional comments. When both parties have electronically signed the RED, they will each receive a final copy and a copy will also be sent to Human Resources and stored in the employee's Banner account.

Note: *An overall section rating of NI or DNM for Objectives/Key responsibilities requires creation of a performance improvement plan in alignment with the University's Corrective Action policy.*