Instructions for Supervisors to complete Personal Information, Objectives and Competency Ratings for Direct Reports

1. On the direct reports 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 and department.) Also, you will be asked to enter the date of the assessment, for the year-end assessment enter 05/31/yyyy.

Note: While in the RED Form itself, 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 directions for each of those respective phases.
2. For each of your direct report's objectives, enter the weighting of the objective and your rating. 
   **Note:** The weighting should total 100%.

   **Reminder:** The system will automatically assign a rating based on your rating of each objective and the weighting of each objective.
3. 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. **Reason:** The appropriate list of competencies will display. Supervisors have more competencies to demonstrate than do employees.

**Note:** Click on Employee Competencies for a list of the employee competencies and click on Supervisor Competencies for a list of the supervisor competencies.
4. Enter the rating for each competency.

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

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

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

PW+
The list of competencies for the supervisors include two more than the employees are rated on.

Note: Competencies #8 & 9 are for supervisors only.
The final rating scale and overall rating for both the objective and competency sections are automatically calculated by Formstack.

**Overall Performance Rating: Year-End Assessment**

<table>
<thead>
<tr>
<th>EP</th>
<th>Exceptional Performance (requires written supporting rationale)</th>
</tr>
</thead>
<tbody>
<tr>
<td>PW+</td>
<td>Performs well in all aspects of the job; exceeds expectations in a few areas (requires written supporting rationale)</td>
</tr>
<tr>
<td>PW</td>
<td>Performs well in all aspects of the job</td>
</tr>
<tr>
<td>NI</td>
<td>Needs Improvement (requires written supporting rationale)</td>
</tr>
<tr>
<td>DNW</td>
<td>Does not meet expectations (requires written supporting rationale)</td>
</tr>
</tbody>
</table>

*Comments required for each rating except PW*

**Final Rating:**

*PW+*