RED Formstack #2 - Instructions for Employees to Complete Employee Information, Supervisor Information, Objectives, Competencies, Professional Development Plan and Self-Assessment - 2023

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. For instructions, click on the icons in the RED Form for the relevant stage of the performance cycle.

Employee's Information

Enter the following on the RED Form:

1. Your **First Name, Last Name**, **Job Title**, **St. John's 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.

ST. JOHN'S UNIVERSITY

ATTENTION: You Cannot Save This Form

Please note that you cannot save your progress on this form. Once you leave or close the form, any unsaved information will be lost.

We encourage you to write and save your entries in a separate Word Document until you are ready to submit this form.

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.

BEGINNING OF PERFORMANCE CYCLE   END OF PERFORMANCE CYCLE

Please complete all information below:

Employee's Name *		Employee's Title *	St. John's University Employee Email *	Employee X-Number *
Eileen	Caufield	Associate Director, Training & Dev	caufiele@stjohns.edu	
First Name	Last Name			

School or Department *
Human Resources Training & Deve

Periodic Check In Date

4. Enter Your supervisor's **First Name**, **Last Name**, and **St. John's Email** address (confirm the email address). **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 *

Lisa	Goldrick
First Name	Last Name

Supervisor's Email *

goldricl@stjohns.edu

Confirm Supervisor's Email *

goldricl@stjohns.edu

Please enter your Supervisor's St. John's University email address

 Note: For tips on how to write the objectives/key responsibilities, click on the arrow labeled **Beginning of Performance Cycle**. For descriptions of the Ratings, click on the icon labeled **Ratings Description**.

Employee's Objectives/Key Responsibilities - 60% overall weighting
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:
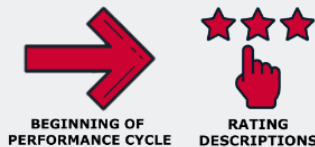
BEGINNING OF PERFORMANCE CYCLE

RATING DESCRIPTIONS

5. Write down the objectives (one objective per box) that reflect the major work performed during the reporting cycle. **Note:** You should have between 3-5 major objectives. This year, you are asked to enter a weighting for each objective. **The weighting must equal 100%.**

#1 Objective/Key Responsibility *

Design and Deliver Training Programs - Continue to deliver to the University Community ongoing training and development workshops in both in-person and webinar formats throughout the year with the goal of achieving an overall evaluation of 90% very good/excellent.

4736/5000

#1 Objective/Key Responsibility Weighting (%) *

50

Enter a number from 0 - 100 | Leave field blank otherwise

#2 Objective/Key Responsibility *

Training Administration - Weekly, download the online Canvas completion results for the mandatory training programs (discrimination, Active Shooter Preparedness, Emergency Readiness, Title IX) and the SANS Cybersecurity training and upload the completions into Banner. Monitor the new hire lists and enroll all new hires into the required training programs bi-monthly.

4630/5000

#2 Objective/Key Responsibility Weighting (%) *

15

Enter a number from 0 - 100 | Leave field blank otherwise

#3 Objective/Key Responsibility *

Diversity, Equity & Inclusion - Conduct monthly discussion sessions for the Equity & Inclusion cohort members pursuing the Equity & Inclusion Certificate during the fall and spring semesters. Identify. Identify sources for inclusion in an anti-racism curriculum.

4734/5000

#3 Objective/Key Responsibility Weighting (%) *

15

Enter a number from 0 - 100 | Leave field blank otherwise

#4 Objective/Key Responsibility

Strategic Planning and People Management - Manage the training budge to esnure program needs are met; identify a way to convert the section's paper files to a digital format for implementation in FY 2023.

4796/5000

#4 Objective/Key Responsibility Weighting (%)

10

Enter a number from 0 - 100 | Leave field blank otherwise

#5 Objective/Key Responsibility

Custom Training Facilitation - facilitate customized training workshops as requested.

4914/5000

#5 Objective/Key Responsibility Weighting (%)

10

Enter a number from 0 - 100 | Leave field blank otherwise

Weighting must equal 100% *

100

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.

END OF
PERFORMANCE CYCLE

6. 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 demonstrated each one of St. John's competencies.

Employee's Self-Assessment

Objective #1 – Design and Delivery of Training Programs - From June 1, 2022, to May 31, 2023, a total of xxxxx faculty, adjuncts, administrators, staff, per diems and students received training in the programs sponsored by Human Resources. Of the xxxxx trained, xxxx completed the training in Canvas, xxx completed the online Information Technology training, and the remaining were trained through a combination of in-person and webinar attendance. Slightly more people attended the programs via the webinar format, supporting the need to continue to offer training via webinar. During the past fiscal year, a new training program, xxxxx, was developed in anticipation of the University roll out of the program.   For those programs facilitated by the Associate Director of Training and Development, the 90% very good/excellent rating was maintained.

As part of the delivery of the training programs, I respond daily to email and phone inquiries from learners regarding Canvas, I troubleshoot issues with Canvas when they arise, and respond to inquiries regarding the completion status of learners' mandatory training requirements.

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.

Note: 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. Click on the employee or supervisor competencies to see a list of the competencies and examples of them. Also, you can find the list of employee competencies and supervisor competencies on the HR Services webpage in the RED Section. **Your supervisor will add the ratings for the competencies**. The employee does not add any rating to the competency section. However**, you should address how you demonstrated the competencies in your self-assessment.**

Competencies - 40% overall weighting

The Catholic and Vincentian tradition at St. John's University is the foundation and the source of the core values its members strive to embody: truth, love, respect, opportunity, excellence, and service.

The Mission and Values are expressed and integrated into the work at St. John's through the following competencies.

Please select the role that best describes the employee being evaluated: *

Supervisor

Please rate the Core Competencies listed below.

For examples click the icon below:

EMPLOYEE COMPETENCIES   **SUPERVISOR COMPETENCIES**

1. Provide Timely and Excellent Service:

Please select a rating for 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.

Please select a rating for Diversity and Inclusivity: *

[▲▼]

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 *

[▲▼]

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 *

[▲▼]

5. Collegiality and Teamwork:

Works collaboratively and respectfully within and across departments.

Please select a rating for Collegiality and Teamwork *

[▲▼]

6. Communication:

Communicates clearly, concisely, and respectfully in all interactions.

Please select a rating for Communication *

[▲▼]

7. Quality of Work:

Provides accurate complete products and services

Please select a rating for Quality of Work *

[▲▼]

8. People Management:

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

Please select a rating for People Management *

[▲▼]

9. Planning and Strategic Vision:

Develops plans to support business unit objectives

Please select a rating for Planning and Strategic Vision *

[▲▼]

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

Note: The [Professional Development Plan](#) does not appear on the employee's portion of the RED Form, it appears on the supervisor's version of the employee's form. However, you should add professional development activities to your plan and inform your supervisor of what you have completed during the past year. 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 during your one-on-one meetings 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)	Action steps/Timeframe	Results/Actions taken
Complete LinkedIn Learning course on Articulate	By March 30, 2023	Completed Feb. 28, 2023
Learned how to do VLookup in Excel	December 15, 2022	January 20, 2023

7. After you complete your self-assessment, click on **Submit Form**. Your form will be sent immediately to the supervisor's email you entered on the form.

Submit Form

🔒 Form secured by **Formstack**

Result: You will receive confirmation that your form was submitted.

ST. JOHN'S UNIVERSITY

✓

Thank You

The form was submitted successfully.

8. Upon submission of your RED form 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.

9. 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 Sample Complete! - Eileen Caufield | Submission ID: 1097364877

Office of Human Resources via Formstack <hr_formstack@stjohns.edu>
To ● Eileen Caufield
Cc ● Lisa Goldrick; ○ hr_formstack@stjohns.edu

(i) Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Reply | Reply All | Forward
Wed 5/3/2023 2:25 PM

HR_PFP_2023.pdf
352 KB

* External Email *

Submission ID: 1097364877 | Date Completed | May 3, 2023 2:25 PM

Hello Eileen Caufield and Lisa Goldrick. 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 and Lisa has signed the document, Eileen Caufield will be assigned a step and will need to sign their Recognize Excellence and Development (RED) form in Formstack. Once signature is complete, a signed unwatermarked document will be sent to both Eileen and Lisa. Failure to sign your agreed upon RED Form will result in the RED process not being complete.

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

Sample RED Form

Next steps:

1. Supervisor and employee complete one-on-one meeting to discuss the employee's RED Form.

2. After the meeting is held, the supervisor signs the form and submits it to the employee for their countersignature.