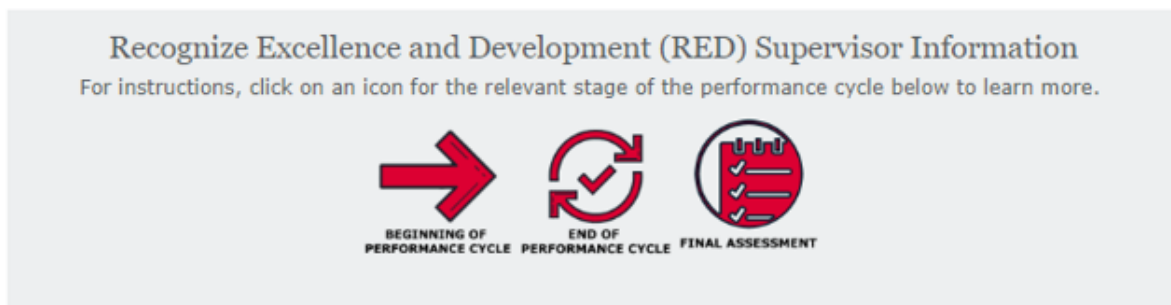


RED Formstack #5 - Instructions for Supervisors to complete Personal Information, and Rate the Objectives and Competencies on Direct Reports' RED Form - 2023

Note: If you click on the images for the [Beginning of Performance Cycle](#), [End of Performance Cycle](#) and [Final Assessment](#) while in the RED Form, you will be brought to the instructions for each of those respective phases.

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), XID number and department. For the department, select from the drop-down menu. Also, you will be asked to enter the date of the assessment, for the year-end assessment enter 05/31/yyyy. **Note:** Skip the Periodic Check in Date since this is not a periodic review.



Please complete all information below:

Supervisor's Name *

First Name: Lisa
Last Name: Goldrick

Supervisor's Title *

Assoc. Director

Supervisor's Email *

goldricl@stjohns.edu

Supervisor X-Number *

x

Confirm Supervisor's Email *

goldricl@stjohns.edu

Please enter your St. John's University email address

School or Department *

Human Res.

If your department is not listed, please select "Other Department" at the bottom of the list

Periodic Check In Date

Three empty date input fields with a calendar icon.

Final Assessment Date

05 31 2023

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Note: If you click on the images for the [Beginning of Performance Cycle](#) and [Rating Descriptions](#), while in the RED form you will be brought to the instructions for each of those phases.



The [Beginning of Performance Cycle](#) provides information on the objectives and key responsibilities, competencies, and the professional development plan.

The [Rating Descriptions](#) document provides information on all the rating scales along with sample behavioral descriptions.

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- For each of your direct report's objectives, enter the weighting of the objective and your rating. **Note:** The weighting should total 100%. Select the rating from the drop-down menu.

<p>#1 Objective/Key Responsibility *</p> <p>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.</p> <p>3/2023/3/2023</p>	<p>#1 Objective/Key Responsibility Weighting (%) *</p> <input type="text" value="50"/> <p>Enter a number from 0 - 100 Leave field blank otherwise</p>	<p>#1 Objective/Key Responsibility Rating *</p> <input type="text" value="EP"/>
<p>#2 Objective/Key Responsibility *</p> <p>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.</p> <p>3/2023/3/2023</p>	<p>#2 Objective/Key Responsibility Weighting (%) *</p> <input type="text" value="15"/> <p>Enter a number from 0 - 100 Leave field blank otherwise</p>	<p>#2 Objective/Key Responsibility Rating *</p> <input type="text" value="EP"/>
<p>#3 Objective/Key Responsibility *</p> <p>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.</p> <p>3/2023/3/2023</p>	<p>#3 Objective/Key Responsibility Weighting (%) *</p> <input type="text" value="15"/> <p>Enter a number from 0 - 100 Leave field blank otherwise</p>	<p>#3 Objective/Key Responsibility Rating *</p> <input type="text" value="PW"/>
<p>#4 Objective/Key Responsibility</p> <p>Strategic Planning and People Management - Manage the training budget to ensure program needs are met; identify a way to convert the section's paper files to a digital format for implementation in FY 2023.</p> <p>3/2023/3/2023</p>	<p>#4 Objective/Key Responsibility Weighting (%) *</p> <input type="text" value="10"/> <p>Enter a number from 0 - 100 Leave field blank otherwise</p>	<p>#4 Objective/Key Responsibility Rating</p> <input type="text" value="EP"/>
<p>#5 Objective/Key Responsibility</p> <p>Custom Training Facilitation - facilitate customized training workshops as requested.</p> <p>3/2023/3/2023</p>	<p>#5 Objective/Key Responsibility Weighting (%) *</p> <input type="text" value="10"/> <p>Enter a number from 0 - 100 Leave field blank otherwise</p>	<p>#5 Objective/Key Responsibility Rating</p> <input type="text" value="PW"/>



Weighting must equal 100% *

Reminder: The system will automatically assign an overall year-end rating based on your weighting and rating of each objective.

Overall Year-end Rating Scale: Objectives & Key Responsibilities:

EP

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- 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. Supervisors have more competencies to demonstrate than do employees. Select the appropriate category from the drop-down menu.

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.

Evaluation is for *

Employee

Please select the role that best describes you at St. John's University

Please rate the Core Competencies listed below.

For examples click the icon below:



**EMPLOYEE
COMPETENCIES**



**SUPERVISOR
COMPETENCIES**

Note: While in the RED Form, click on [Employee Competencies](#) for a description of each of the competencies.

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4. Enter the rating for each competency by selecting the rating from the drop-down menu.

1. Provide Timely and Excellent Service:

Please select a rating for Timely and Excellent Service: *

PW+

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 *

EP

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 *

EP

6. Communication:

Communicates clearly, concisely, and respectfully in all interactions.

Please select a rating for Communication *

EP

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+

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

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The [list of competencies for the supervisors](#) includes a total of 9 competencies (two more than for employees). **Note:** Competencies #8 & 9 are for supervisors only.

Please rate the Core Competencies listed below for all employees.

For examples click the icon below:



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 *

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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

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:

EP