

RED Formstack #7 - Instructions for Supervisors to Complete Supervisor Summary for Direct Reports - 2023

Supervisors must provide a narrative for any objective or competency rating other than a **PW** rating. Supervisors must justify a rating of EP, PW+, NI, DNM.

1. In the **Supervisor's Summary** section, supervisors are required to provide a narrative for any rating other than PW. It is recommended that supervisors address each objective and each competency.

Supervisor's Summary

Objective #1 - ~~xxxxxx~~ did an outstanding job in objective 1. She excelled at . . .

Objective #2 - ~~xxxxxx~~ performed well during the past fiscal year in completing . . .

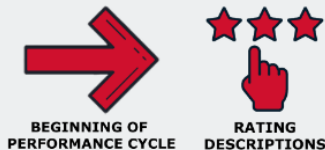
Competencies

Timely and Excellent Service – xxx completes their assigned tasks on time and with few errors. I have received compliments from clients on how well and timely xxx responds to their inquiries and the professional and collegial way they interact with those they serve.

Note: Click on the [Rating Descriptions](#) while in the RED Form to access the definitions 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:



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Rating Scale and Definitions

- EP** **Exceptional Performance** (requires written supporting rationale) – Performance consistently and significantly exceeds departmental and position expectations
- PW+** **Performing Well Plus** (requires written supporting rationale) – Performs well in all aspects of the job, exceeds expectations in a few areas
- PW** **Performing Well – no written rationale required** – Performance consistently meets expectations and job requirements
- NI** **Needs Improvement** (requires written supporting rationale) – Performance consistently does not meet expectations and improvement is required
- DNM** **Does Not Meet Expectations** (requires written supporting rationale) – Performance does not meet expectations
- N/A** **Not Applicable** – no written rationale required

Rating Scale with sample behavioral descriptions:

- EP** **Exceptional Performance** (requires written supporting rationale)
- Exceeded requirements even on the most difficult and complex aspects of the job
 - Accomplished far more than expected
 - Initiated new projects and solutions. Was able to take on additional assignments without affecting other work
 - Put students' needs first and worked to overcome obstacles to serve students' needs
 - Completed projects thoroughly, completely and ahead of schedule
 - Required little or no supervision and follow-up
 - Did advance planning, anticipated problems and took appropriate action
 - Exhibited exceptional leadership ability and was a role model for others
 - Demonstrated an exemplary commitment towards the team, department, institutional goals and SJU Mission and Values at Work
 - "XXX has not only performed all of her responsibilities, but has also incorporated her talents and experience to the enhancement of the department as a whole. She has gone above and beyond meeting her job expectations, and has taken on additional responsibilities throughout the year. She is a quick and enthusiastic learner who works positively and productively with her colleagues and supervisor. She strives to deliver accurate and prompt service to our students, and is helpful and knowledgeable when interacting with family and staff. She has been an asset to the department."

Note: Click on [sample rating descriptions](#) for additional narratives in support of the rating descriptions. These sample descriptions can be found on the Human Resources webpage.

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

Submit Form

Form secured by [Formstack](#)

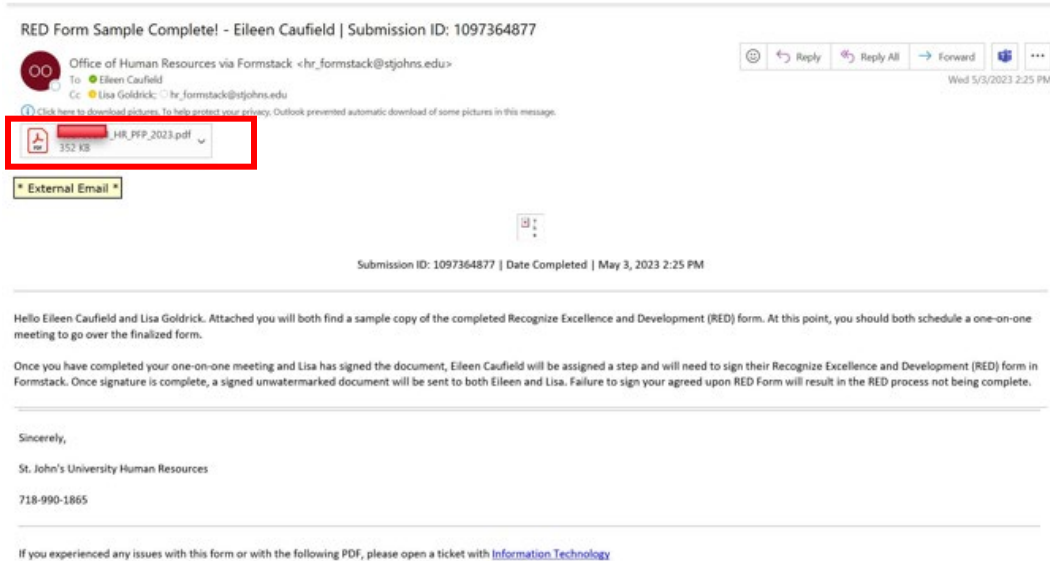


Thank You
The form was submitted successfully.

Result: You will receive confirmation the form was submitted.

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Result: Formstack sends you and your direct report an email that the RED form was completed by you, the supervisor, and transmits a **sample** copy of the RED Form. The form will have the **SAMPLE** watermark on it. You are required to schedule a meeting with your direct report to discuss the RED Form.



Recognize Excellence and Development (RED)
Revised 4/4/2023

Employee's Name: Eileen Caulfield Supervisor's Name: Lisa Goldrick
Title: Associate Director, Training & Development Title: Director
Email: caulfield@stjohns.edu Email: egoldrick@stjohns.edu
XNumber: [REDACTED] XNumber: [REDACTED]

School or Department: Human Resources Final Assessment Date: 05/31/2023
Periodic Check In Date:

Objectives/Key Responsibilities – 60% overall weighting

Objectives	Rating/Weight
#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.	EP Weighting: 50%
#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 list and enroll all new hires into the required training programs bi-monthly.	EP Weighting: 15%
#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.	PW+ Weighting: 15%
#4 Objective/Key Responsibility: 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.	EP Weighting: 10%
#5 Objective/Key Responsibility: Custom Training Facilitation - facilitate customized training workshops as requested.	PW+ Weighting: 10%
	100%

OVERALL YEAR-END RATING SCALE: OBJECTIVES & KEY RESPONSIBILITIES: EP

Competencies – 40% overall weighting

Competencies	Rating
1. Provide Timely and Excellent Service	EP
2. Diversity and Inclusion	EP
3. Shared Ownership/Accountability	EP
4. Adapting to Change	EP
5. Collegiality and Teamwork	EP
6. Communication	EP
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 EP

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- Formstack sends the supervisor an email notifying them that they have an additional workflow to complete, i.e., the one-on-one meeting with the employees. **The workflow will remain open until the meeting is conducted, and both the supervisor and employee sign the RED Form.**

From: noreply@formstack.com <noreply@formstack.com>
Sent: Wednesday, May 3, 2023 2:25 PM
To: Lisa Goldrick <goldrick@stjohns.edu>
Subject: # 6 - Performance Review Meeting (Recognize Excellence and Development Workflow v4.2.1) has been assigned to you

 formstack

6 - Performance Review Meeting (Recognize Excellence and Development Workflow v4.2.1) has been assigned to you

 **ST. JOHN'S UNIVERSITY**

Request ID: 6 | Recognize Excellence and Development Workflow v4.2.1

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](#)

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

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Formstack, 11671 Lantern Road, Suite 300, Fishers, IN 46038

- The supervisor can access the employee's RED Form to sign it by clicking on **Visit Workspace to Complete Task** or by clicking on the **Formstack** tile from the dashboard. **Note: See RED Formstack #8 Instructions for Signing the Direct Reports' RED Form in Formstack.**