



ST. JOHN'S  
UNIVERSITY

2025

# Performance Management Training for Supervisors

LISA GOLDRICK, Training & Development Specialist

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# Land & Labor Acknowledgement

We acknowledge the land on which our campus is located as the ancestral homelands of the Lenape (Lenapehoking) people. We honor the Lenape and the diverse indigenous peoples still connected to this land. We also acknowledge all immigrant and Indigenous labor, voluntary and involuntary, and honor their struggle by committing to the advancement of the Mission and Values of St. John's University, which embraces the Judeo-Christian ideals of respect for the rights and dignity of every person, and each individual's responsibility for the world in which we live.

Unsure which lands you sit on? Visit <https://native-land.ca>.





# Today's Topics

- Evaluating performance via the RED form
  - Objectives
  - Competencies
  - Professional Development
- Using Formstack to Complete the RED Form for employees
- Tips for scheduling and conducting the feedback sessions



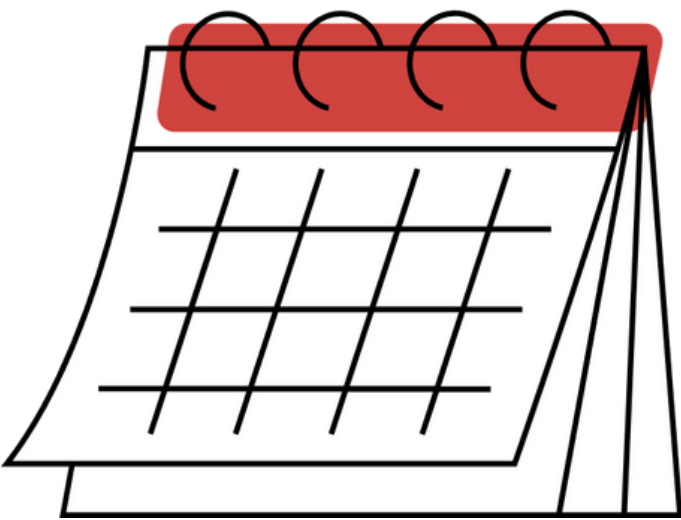


# Purpose of Performance Assessment

- Creates a forum for **open dialogue** between employee and manager.
- Provides an opportunity for managers to share the **direction of the University/department/unit** and how each employee's job fits in.
- Clarifies **mutually understood expectations** and provides a basis for measuring an employee's ongoing performance.
- Provides opportunity for **coaching** and giving **feedback**.



# Stages of Performance Cycle



Beginning of  
Performance Cycle

During Performance  
Cycle

End of Performance  
Cycle

Final Assessment

**Recognize Excellence and Development (RED)**

Revised: 6/1/2023

Employee's Name: Elean Cusfield  
Title: Associate Director, Training & Development  
Email: cusfield@stjohns.edu  
MNumber: 902755383

Supervisor's Name: Lisa Saltschik  
Title: Director  
Email: gennet@stjohns.edu  
MNumber: 902330547

School or Department: Human Resources Training & Development  
Periodic Check In Date: Final Assessment Date: 05/15/2023

Objectives/Key Responsibilities – 60% overall weighting

| Objectives   | Rating/Weight        |
|--|----------------------|
| <b>01 Objectives/Key Responsibility:</b><br>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 30% very good/positive.  | EP<br>Weighting: 30% |
| <b>02 Objectives/Key Responsibility:</b><br>Training Administration - Weekly, download the entire Canvas completed results for the mandatory training programs (discrimination, Active Shooter Preparedness, Emergency Readiness, Title IX) and the SARS Cybersecurity training and upload the completions into Banner. Monitor the new hire list and enroll all new hires into the required training programs by monthly. | EP<br>Weighting: 30% |
| <b>03 Objectives/Key Responsibility:</b><br>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 extension curriculum.   | EP<br>Weighting: 30% |
| <b>04 Objectives/Key Responsibility:</b><br>Strategic Planning and People Management - Manage the training budget to ensure program needs are met, identify a way to convert the sector's paper Faculty a digital format for implementation in FY 2023.  | EP<br>Weighting: 30% |
| <b>05 Objectives/Key Responsibility:</b><br>Custom Training Development - facilitate customized training workshops as requested.   | EP<br>Weighting: 30% |
| <b>Overall Year-End Rating: Objectives &amp; Key Responsibilities:</b>   | EP                   |

Competencies – 40% overall weighting

| Competencies                           | Rating |
|--|--------|
| 1. People Trends 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**

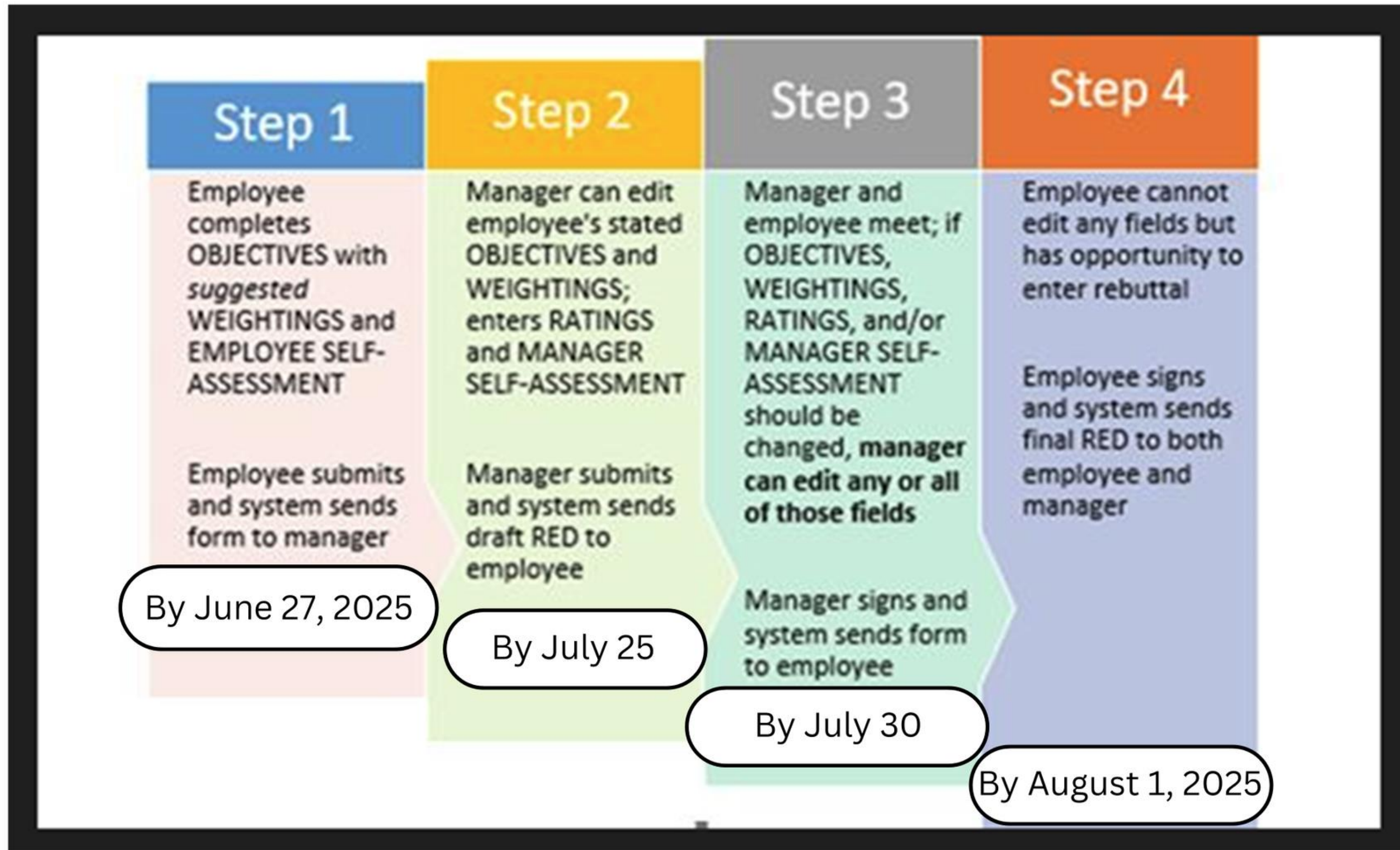
EP

3 | Page

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# Overview of RED Process in Formstack for 2025





**The RED Form Closes the  
night of Friday, August 1,  
2025. Sign and submit your  
FINAL RED Form by August 1.**

**No access to Formstack starting  
August 1, 2025, 11:59pm!**





# Performance Weighting Breakdown

June 1st through May 31st

|  |     |        |   |
|--|-----|--------|---|
| Objectives   | 60% | What   | Achievements, results, outputs measured in terms of Quality, Quantity, Time                     |
| St John's University's Values at Work & competencies | 40% | How    | Through St. John's University's Values, how do you apply behaviors, skills knowledge to the job |
| Development Plan                                     |     | How to | Opportunities to grow or improve  |





# Performance Planning: Objective Setting

- Occurs at the beginning of the cycle. Foundation for the whole process.
- Lets you know what's expected and how your performance will be assessed.
- Gives you the opportunity to provide input about how to perform your job.
- Helps you stay on track and remain clear on changing priorities throughout the cycle.
- Positions you for success; eliminates surprises.
- Focuses on the results of your work.
- Aligns the institutional priorities throughout the organization so that we're all working toward the same end.



# How are Objectives Developed?





# Guidelines for Writing Performance Objectives

## Think About:

- How to translate tasks into results and differentiate between a task and the expected result(s) of the effort.
- The specific results you will be held accountable for.
- Why are you doing this? How will you know if your goal has been achieved?
- Who receives the service you provide?
- What do the recipients expect in terms of:
  - **quality (90% very good or excellent on evaluations),**
  - **quantity (increase student enrollment by 5% over the previous year)**
  - **timeliness (resolve help desk tickets within 24 hours)?**
- The SMART Criteria.



# Beginning of Performance Cycle: June 3 – July 26

- ✓ Manager communicates to employee job objectives for performance cycle
- ✓ Identify a minimum of 3 objectives (No more than 5)
- ✓ Align job objectives to department objectives and strategic foundational themes:

**1. Pillar 1: Student Success: Reimagining the Student Experience to Deepen Connection, Engagement, and Belonging**

**2. Pillar 2: Academic Distinction—Excellence in Teaching, Learning, and Research**

**3. Pillar 3: Mission, Equity, and Inclusion: Building a Community of Belonging**

**4. Pillar 4: Institutional Resources: Growing and Optimizing Institutional Assets**

**5. Pillar 5: The St. John's Identity: Elevating our National and Global Stature**





# Beginning of Performance Cycle: June 2 – July 25 continued...



Ensure objectives meet S.M.A.R.T. criteria

- Specific
- Measurable
- Attainable
- Relevant
- Time-Bound



Link objectives/key responsibilities to the job. Note: If 2 or more employees perform the same job, then objectives & responsibilities must be the same



Specify a weighting for each objective/key responsibility



# Objective Weighting - 60% Overall Weights

| Objective  | Weighting |
|--|-----------|
| Objective 1 – Design and Delivery of Training Programs- During the fiscal year , deliver 2-3 workshops for <u>each</u> of the following programs): Quality Service, Time Management, Active Listening, Effective Meetings, Coaching, Managing for Success, etc., with a very good/excellent rating of 90% and ensure participation rate is consistent with targets | 35%       |
| Objective 2 – Complete the certificate tracking project so that each active administrator and staff member has a completed profile established in the Excel spreadsheet by May 31, 20xx.   | 25%       |
| Objective 3 – Develop a Telecommuting online course in Canvas, complete with evaluation and review questions, by April 30, 20xx  | 20%       |
| Objective 4 – Develop and pilot <b>Adapting to Change</b> by August 31, 20xx. Train 25 people by 12/31/xx with a very good/excellent rating of at least 90%.   | 20%       |
| OBJECTIVE TOTALS   | 100%      |



# Staff Competencies - 40% Overall Weighting

The Mission/St. John's Values at Work are expressed & integrated into the work at St. John's through the following competencies:

Provide timely and excellent service

Communication

Diversity  
&  
Inclusion

Quality of  
Work

Collegiality &  
Teamwork

Shared Ownership  
& accountability

Adapting to Change



# Supervisor Competencies - 40% Overall Weighting

The Mission/St. John's Values at Work are expressed & integrated into the work at St. John's through the following competencies:

Provide timely and excellent service

Communication

Diversity  
&  
Inclusion

Planning &  
Strategic  
Vision

People  
Management

Quality of  
Work

Collegiality &  
Teamwork

Shared Ownership  
& accountability

Adapting to Change





# Beginning of Performance Cycle: June 1 – July 31

**Professional Development Plan** – this section is used to identify skills, knowledge and abilities for future growth, growth in the current job or competency development.

## Managers must:

- Partner with employee to establish plan to develop knowledge, skills and abilities;
- Provide a timeline within performance review period for progress.
- Ensure employee is compliant in all University required training.



# During the Performance Cycle

Check in with employees throughout the year to ensure employees are on track and objectives remain relevant



**Check-in →**

Note significant accomplishments, changes in direction, or areas for improvement

Any changes in objectives during the reporting period must be discussed with the employee and signed and dated by both manager and employee

No rating and no paperwork submitted to HR



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## End of Performance Cycle

- June 2 - Request that employees submit self-assessment by **June 27th**.
- By **July 25** – Managers prepare the final assessment using the employee's self-assessment as a guide. Managers are asked to submit their final assessment in the Formstack RED Form.
- By July 26 – Employees were allowed to review the final assessment and meet with their supervisors at least 24 hours later. Employee signs and submits the FINAL RED form by July 31, 2025. The form CLOSES on **August 1**.
- Please return to your departments and discuss a plan with your supervisor.
- Note: If you have questions about submitting your RED Form, please contact your HR Services' representative.

**Karen Crowley: 718-990-1502; Marian Saia: 718-990-2445**



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# Writing Comments

- Consult your performance log.
- Ensure that comments include specific, factual and descriptive examples that are job-related and behaviorally written.
- Make sure comments match the rating.
- Strive for clarity.
- Focus on accomplishments and results produced.
- Identify strengths and development areas.

NOTE: IF YOU ARE A NEW MANAGER OR YOU HAVE NEW DIRECT REPORTS, YOU SHOULD ASK YOUR EMPLOYEES FOR A COPY OF THEIR RED FORM FROM LAST YEAR OR CONTACT HR.

COMMENT

# Five-Point Rating Scale

Comments are required for each rating except PW

**EP =  
Exceptional  
Performance**

Performance consistently and significantly exceeds departmental and position expectations

**PW+ =  
Performs  
Well Plus**

Performs well in all aspects of the job, exceeds expectations in a few areas

**PW=  
Performs Well  
(no written  
rationale  
required)**

Performance consistently meets expectations and job requirements

**NI = Needs  
Improvement**

Performance consistently does not meet expectations and improvement is required.

**DNM – Does  
not meet  
expectations**

Performance does not meet expectations

# Completing Your Self Assessment

- Seek agreement from your supervisor on the objectives you will assess in your evaluation.
- Write your self-assessment in a Word document.
- Be as honest and factual as possible.
- List all of your accomplishments from the year; note reasons for set-backs.
- Include enough specific details so that your manager understands your contributions.
- Highlight changes in priorities that arose during the cycle.
- Use the **RED** form to complete your self-assessment (copy and paste from the Word document into the Formstack **RED** Form)
- Send self-assessment to your manager prior to your performance discussion meeting.
- Expect your manager to add comments accordingly.
- Understand that your supervisor has final say.





# Self-Assessment Samples

- I have been attending departmental meetings with the goal of making suggestions to improve work processes, and one of my suggestions, xxxxxxxx, resulted in a change in procedures that has saved the department over \$2,000 this year alone.
- Despite the reduced headcount in our department, I have completed my database project on time and \$1,000 under budget. As a result, students can now access their information in two clicks instead of four and the information is updated immediately instead of every 24 hours.
- During the past year, I documented 5 of 7 work processes that were used to train new student workers hired by the department. The documentation resulted in reduced time spent to train the student workers and now serve as desk procedures.



# Participating in the Performance Discussion

01.

Refer to the employee's list of accomplishments.

02.

Make sure the Self-Assessment is complete before the meeting.

03.

Managers will assign ratings to the employee's objectives and competencies based on self-assessment and their own observations and notes.

04.

Write a summary of all ratings (except PW) and submit to the employee.

05.

Discuss with employee the work they have done, objectives achieved, work left to be done and career development.

06.

Discuss areas your employee may wish to develop and/or career interests they may have.



# Tips for Conducting Virtual Feedback Meetings

01

Plan on each meeting to last 45-60 minutes.

Supervisors should send to their direct reports, via email, the SAMPLE RED form complete with their narrative comments and ratings at least 24 hours before the scheduled meeting.

03

Use your webcam for these meetings – it is important that supervisors and direct reports see each other.

Conduct the meeting in-person, via TEAMS, or WebEx Meetings.

05

Discuss the present year's performance and toward the end of the meeting discuss next year's goals.

02

04



# Tips for Conducting your Feedback Meeting

- Focus on the priorities.
- Describe specific situations or behavior.
- Focus on the work; relate feedback to objectives and expectations.
- Balance positive and constructive statements.
- Try to see things from the employee's perspective; share your own experiences.
- Present corrective feedback in positive, actionable way.
- Ensure that the employee understands by asking them to summarize.
- Follow up to monitor improvements and set follow up dates.



# Additional Resources

## HR Services Representatives



Karen Crowley  
718-990-1502  
[crowleyk@stjohns.edu](mailto:crowleyk@stjohns.edu)



Marian Saia  
718-990-2445  
[saiam@stjohns.edu](mailto:saiam@stjohns.edu)

- [HR Services' web page](#)
- [Resources for Telework Success](#)
- [Employee Assistance Program \(EAP\)](#)
- [LinkedIn Learning](#)
- [New UIS Experience>Employee Resources Card>Register for HR Training](#)
- [Training & Development web page](#)
- [HR Training & Development Professional Development Workshops and Certificate Programs](#)

# Employee Starts RED Process





All employees will receive an email from the Office of Human Resources transmitting a link to the RED Form.



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Keaton Wong, J.D.


Associate Vice President for Human Resources

This time of year concludes the annual [Recognize Excellence and Development](#) (RED) performance cycle at St. John's University. The [Office of Human Resources](#) (HR) encourages employees and supervisors to take the time to check in with one another, reflect on the previous year's objectives and achievements, and prepare for the RED process that runs from **June 2 to August 1**.

The RED process is the method used to measure the progress we have individually made in contributing to the University's [mission](#) over the past year. **All full- and part-time staff and administrators who began their employment with the University before April 1, 2025, are required to participate** in the process by completing a self-assessment on the RED form. All full-time supervisors are required to participate in the process by completing year-end assessments on direct reports' RED forms and meeting with direct reports to provide feedback and set goals for the next review cycle.

**Note:** Training recommends that you create an Outlook email archive folder for yourself and label it **RED 2025** to store the RED-related emails you will receive from HR and Formstack.

 RED 2023

 RED 2024

 RED 2025



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## How You Can Prepare for RED


- **Set objectives:** Establishing clear expectations and accountability are key components when crafting your objectives. Now is the perfect time to start thinking about your objectives for the new cycle (6/1/25–5/31/26); review competencies and mission/values; and develop a professional plan.
- **Attend RED training:** We strongly encourage employees (especially those who are new) and supervisors to attend HR training on the RED process. Training sessions include an overview of the performance review process and instructions on how to use the RED form. All training sessions are conducted in person or virtually via a webinar. You can register on **New UIS Experience** to attend training offered either in person or as a webinar: **New UIS Experience Tile >Employee Resource Card>Register for HR Training**. To register for a program, please follow the [registration instructions](#). An [instructional video](#) is available.

| <i>Performance Management Training for Employees (Nonsupervisory Administrators and Staff)</i>   | <i>Performance Management Training for Supervisors</i>  |
|--|---|
| <ul style="list-style-type: none"><li>• Wednesday, May 14, 9–11 a.m. (in person)</li><li>• Thursday, May 15, 1–3 p.m. (in person)</li><li>• Tuesday, May 20, 9:30–11:30 a.m. (webinar)</li><li>• Wednesday, May 28, 1–3 p.m. (in person)</li><li>• Thursday, May 29, 9:30–11:30 a.m. (webinar)</li></ul> | <ul style="list-style-type: none"><li>• Wednesday, May 14, 2:30–4:30 p.m. (in person)</li><li>• Thursday, May 15, 9–11 a.m. (webinar)</li><li>• Tuesday, May 20, 1–3 p.m. (in person)</li><li>• Wednesday, May 21, 9:30–11:30 a.m. (webinar)</li><li>• Wednesday, May 28, 9–11 a.m. (in person)</li></ul> |


- **New! Start your RED Evaluation Now!** If you are ready to begin your RED evaluation, speak with your supervisor and start the process early so you do not miss the deadline. Please click [here](#) to access the RED form.
- **Add important RED dates to your calendar.** Prepare for deadlines using our RED process timeline.


You will be asked to provide a two-factor authentication code in order to access the RED Form.

Click on **Send code**, enter the **code** and click on **Verify**.

Connecting to  formstack

Sign in with your St. John's University account to access Formstack Forms

**ST. JOHN'S UNIVERSITY**



SMS Authentication  
(+1 XXX-XXX-6902)

Send code

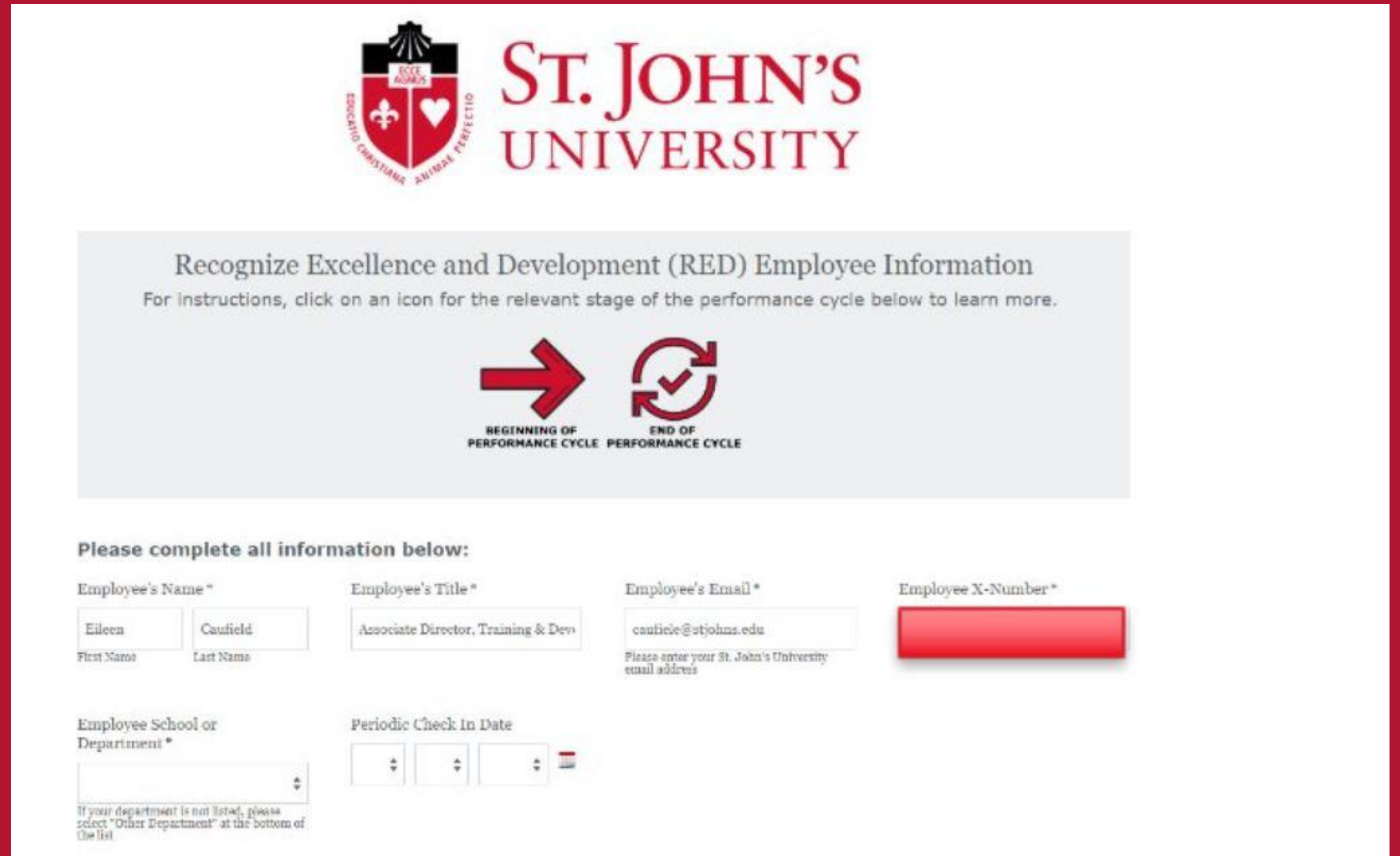
Enter Code

Verify

Sign Out

# Accessing the RED Form from the HR Email

Result after you enter your verification code: You will be brought to the RED Form with some of your personal information pre-filled on the form. Scroll through the form to continue to complete the RED Form.



The screenshot displays the St. John's University logo at the top, featuring a crest with a cross and the motto "EDUCATIO CHRISTIANA ANIMAE PERFECTIO". Below the logo, the text "ST. JOHN'S UNIVERSITY" is written in a serif font. The main heading is "Recognize Excellence and Development (RED) Employee Information". Below this, a subheading reads: "For instructions, click on an icon for the relevant stage of the performance cycle below to learn more." Two icons are shown: a red arrow pointing right labeled "BEGINNING OF PERFORMANCE CYCLE" and a red circular arrow with a checkmark labeled "END OF PERFORMANCE CYCLE". Below the icons, the text "Please complete all information below:" is displayed. The form fields are arranged in two rows. The first row contains four fields: "Employee's Name \*" (split into "First Name" and "Last Name" with values "Eileen" and "Caulfield"), "Employee's Title \*" (value "Associate Director, Training & Dev"), "Employee's Email \*" (value "caulfield@stjohns.edu" with a note "Please enter your St. John's University email address"), and "Employee X-Number \*" (a red button). The second row contains two fields: "Employee School or Department \*" (a dropdown menu with a note "If your department is not listed, please select 'Other Department' at the bottom of the list") and "Periodic Check In Date" (a date picker with a calendar icon).

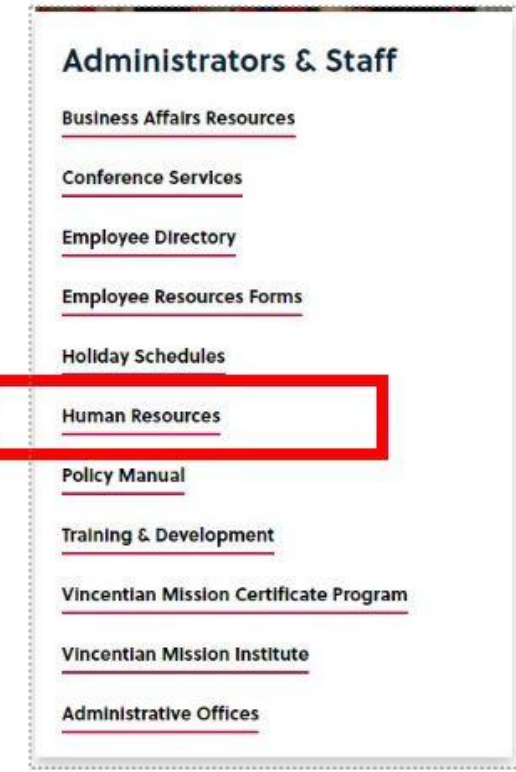




# Accessing the RED Form from the HR Webpage

1. Login to the St. John's website via stjohs.edu

3. Scroll down and click on **Human Resources within the Administration & Staff menu**



2. Scroll to the footer and select **Faculty, Administrators & Staff**



4. From the HR webpage, click on Human Resources Services



# Accessing the RED Form from the Human Resources Webpage

5. Scroll down to the section that reads **Employee Performance Management – Recognize Excellence and Development (RED)** and in the expandable section **For All Employees**, click on the plus sign to expand the section

## Employee Performance Management - Recognize Excellence and Development (RED)

RED is St. John's University's annual, cyclical, performance management program for staff and administrators. To help employees and supervisors get the most out of the performance management process, the following resources, tools and training are provided:

For All Employees



## 6. Click on the RED Form at the entry, Access *the RED Form*



**Result: You will be brought to the RED Form with some of your personal information pre-filled on the form. Scroll through the form to continue to complete the RED Form.**

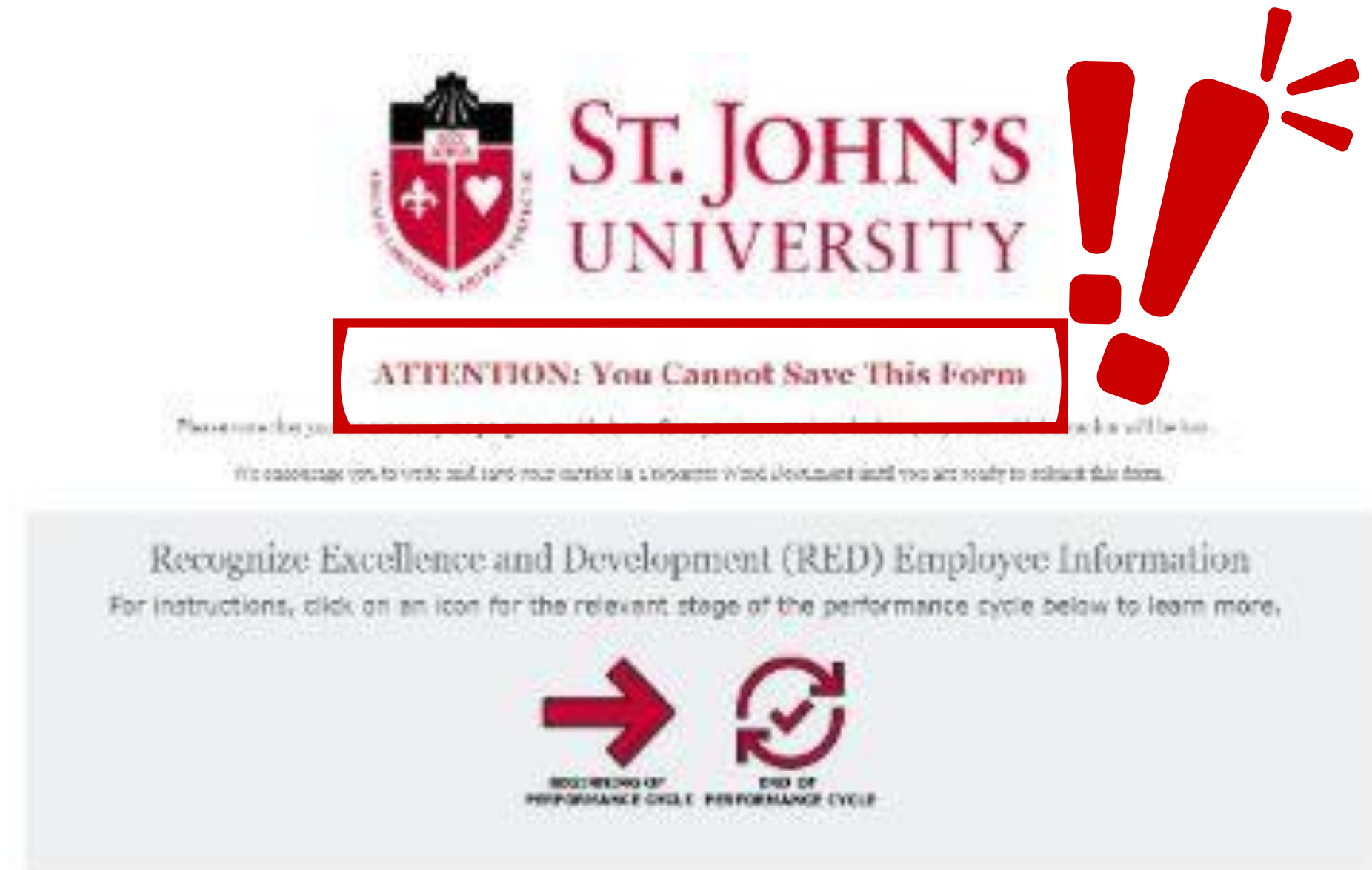




# Completing the RED Form in Formstack – Employee's Information

**CAUTION!** You cannot save the information in the RED Form.

Any partial entry will be lost upon closing the form. When you are ready to complete the RED Form, copy and paste your information from a Word document into the RED Form or be prepared to enter the information directly into the RED Form in one session without interruption. You cannot save partial completion of information added to the RED Form.

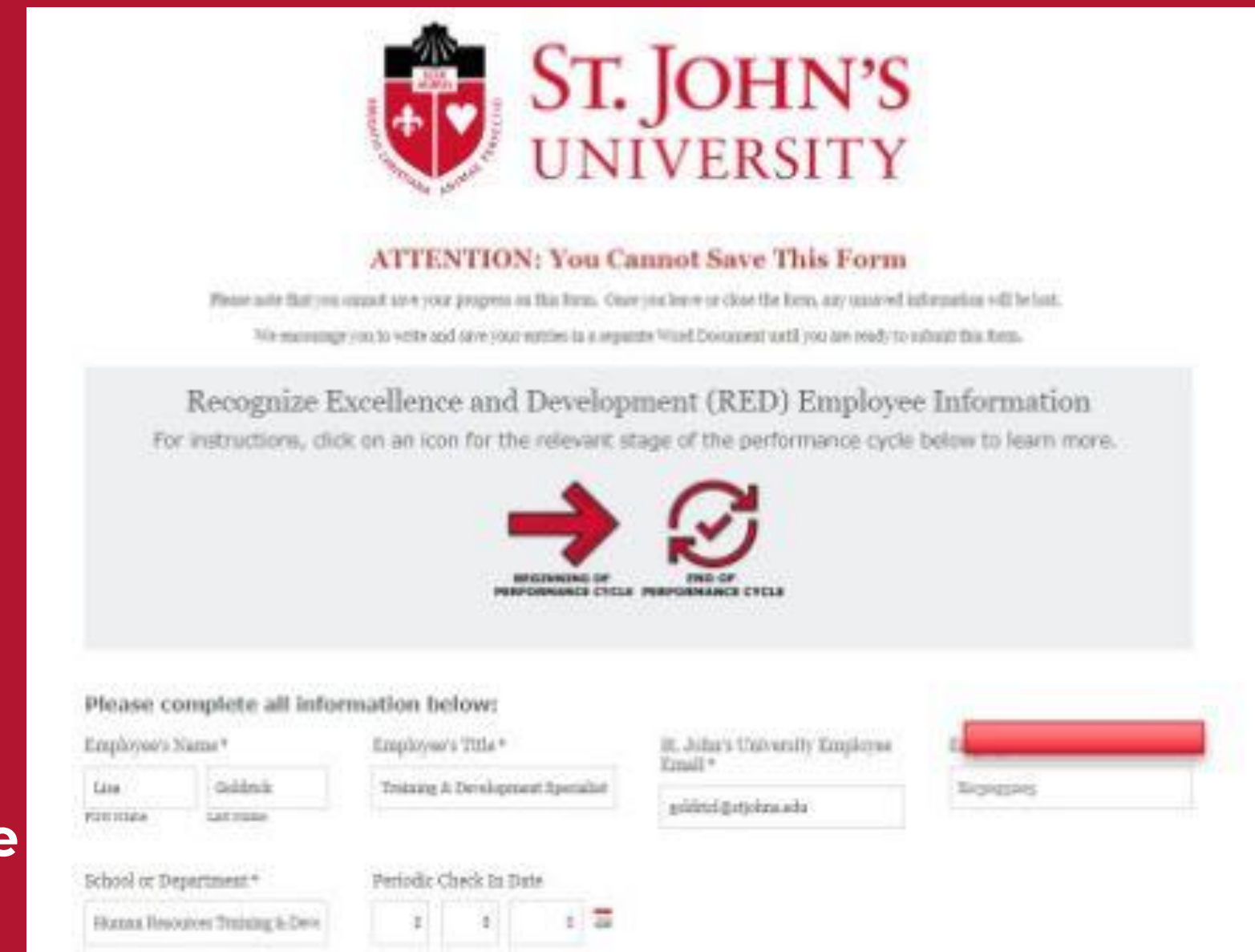


# Completing the RED Form in Formstack – Employee's Information

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.

Enter the following on the RED Form:

1. Your **First Name, Last Name, Job Title, St. John's Email** address (confirm your 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.



The screenshot shows the St. John's University Formstack interface for the RED form. At the top is the university logo and name. Below it is a warning: "ATTENTION: You Cannot Save This Form" with a note that progress cannot be saved and information will be lost. The main heading is "Recognize Excellence and Development (RED) Employee Information" with instructions to click on an icon for the relevant stage of the performance cycle. Two icons are shown: a red arrow pointing right for "BEGINNING OF PERFORMANCE CYCLE" and a circular arrow with a checkmark for "END OF PERFORMANCE CYCLE". Below this, a section titled "Please complete all information below:" contains several form fields. "Employee's Name\*" is split into "First name" (with "Lisa" entered) and "Last name" (with "Goldrick" entered). "Employee's Title\*" has "Training & Development Specialist" entered. "St. John's University Employee Email\*" has "goldrick@stjohns.edu" entered. "School or Department\*" has a dropdown menu showing "Business Resources Training & Dev". "Periodic Check In Date" has a date picker set to 12/1/2023. A red "Signatures" button is on the right.

# Completing the RED Form in Formstack – Supervisor's Information

Enter the following on the RED Form:

1. Your supervisor's **First Name**, **Last Name**, and **St. John's Email** address (confirm the email address)
- 2.**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.

**Verify supervisor's name before you Submit RED Form!**

Recognize Excellence and Development (RED) Supervisor Information  
Please complete all information below:

|   |  |   |
|---|--|---|
| Supervisor's Name *   |  | Supervisor's Email *                              |
| <input type="text" value="Eileen"/>   | <input type="text" value="Caulfield"/> | <input type="text" value="caufiele@stjohns.edu"/> |
| <small>First Name</small>   | <small>Last Name</small>               | Confirm Supervisor's Email *                      |
|   |  | <input type="text" value="caufiele@stjohns.edu"/> |
| <small>Please enter your Supervisor's St. John's University email address</small> |  |   |



# Completing the RED Form in Formstack – Objectives

For tips on how to write the objectives/key responsibilities, click on the arrow labeled Beginning of Performance Cycle.

Write down the objectives (one objective per box) that reflects the major work performed during the reporting cycle. **Note:** You should have between 3-5 major objectives.

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**

#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

Each year you are asked to provide a weighting that reflects the percentage of time you feel you devoted to each objective during the past year. The percentages should total 100%.

Objective/Key Responsibility \*

iversity, Equity & Inclusion - Conduct monthly session sessions for the Equity & Inclusion sort members pursuing the Equity & Inclusion tificate during the fall and spring semesters. ntify. Identify sources for inclusion in an anti-sm curriculum.

4734/5000

#3 Objective/Key Responsibility Weighting (%) \*

15

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

Objective/Key Responsibility

ategic Planning and People Management - nage the training budge to esnure program ds are met; identify a way to convert the tion's paper files to a digital format for plementation in FY 2023.

4796/5000

#4 Objective/Key Responsibility Weighting (%) \*

10

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

Objective/Key Responsibility

ustom Training Facilitation - facilitate omized training workshops as requested.

4914/5000

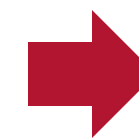
#5 Objective/Key Responsibility Weighting (%) \*

10

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

Weighting must equal 100% \*

00



# Competency Section of RED

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. You can find the [list of competencies](#) on the HR Services webpage in the RED Section. Your supervisor will add the ratings for the competencies.

## 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*

## 8. People Management:

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

## 9. Planning and Strategic Vision:

*Develops plans to support business unit objectives*

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



# Professional Development Plan

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 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



| Skills/knowledge/abilities to be developed (or improved) | Action steps/Timeframe      | Results/Actions taken                 |
|--|-----------------------------|---------------------------------------|
| <p>Complete LinkedIn Learning course on Articulate</p>   | <p>By March 30, 2025</p>    | <p>Completed by February 14, 2025</p> |
| <p>Learned how to do <u>VLookup</u> in Excel</p>         | <p>By December 30, 2024</p> | <p>Completed by December 9, 2024</p>  |



# Completing the RED Form in Formstack – Self-Assessment

For tips on how to write the self-assessment, click on the arrow labeled **End of Performance Cycle**.

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 met each one of St. John's competencies.

### 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**

#### 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, xxxxx 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.

**Important:** Prepare and save your self-assessment in a Word document before copying and pasting into the Formstack RED Form.

# Submitting the RED Form to the Supervisor

When you are finished with the self-assessment, click on Submit Form to submit the self-assessment to your supervisor.

You will receive confirmation that the form was submitted successfully.

Submit Form



Form secured by [Formstack](#)



ST. JOHN'S  
UNIVERSITY



Thank You

The form was submitted successfully.



# Email Notification that RED Was Sent to Supervisor



ST. JOHN'S  
UNIVERSITY

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.

Recognize Excellence and Development Employee Self Assessment for Complete - 6



Office of Human Resources via Formstack <formstack@stjohns.edu>  
To: Eileen Caulfield

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

Reply Reply All Forward

Tue 5/2/2023 4:31 PM



Workflow ID: 6 | Date Completed: May 2, 2023 4:30 PM

Hello Eileen, thank you for submitting your Recognize Excellence and Development (RED) Employee Self-Assessment! Below you'll find a copy of your submission for your records. Your supervisor Lisa will also receive a copy as well! Thank you so much for doing your part over the last year! Your supervisor will look over your objectives and your self-assessment and complete their portion of the review. Upon completion of their part, both you and your supervisor will receive a PDF copy of your Recognize Excellence and Development (RED) form. At that point, you and your supervisor should schedule a one-on-one meeting to discuss your evaluation.

#### Objective/Key Responsibility #1\* at a weight of 50:

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.

#### Objective/Key Responsibility #2\* at a weight of 15:

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.

#### Objective/Key Responsibility #3\* at a weight of 15:

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.

#### Objective/Key Responsibility #4 at a weight of 10:

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.

#### Objective/Key Responsibility #5 at a weight of 10:

Custom Training Facilitation - facilitate customized training workshops as requested.

#### 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, xxxxx 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.

#### Objective #2 - Training Record Administration

With the move to more online training, there has been an increase in the amount of time devoted to training record administration. As stated in objective #1, the training administration in support of the delivery of the training programs has doubled in work due to the dual structure (in-person and webinar formats) that we have adopted.

Sincerely,

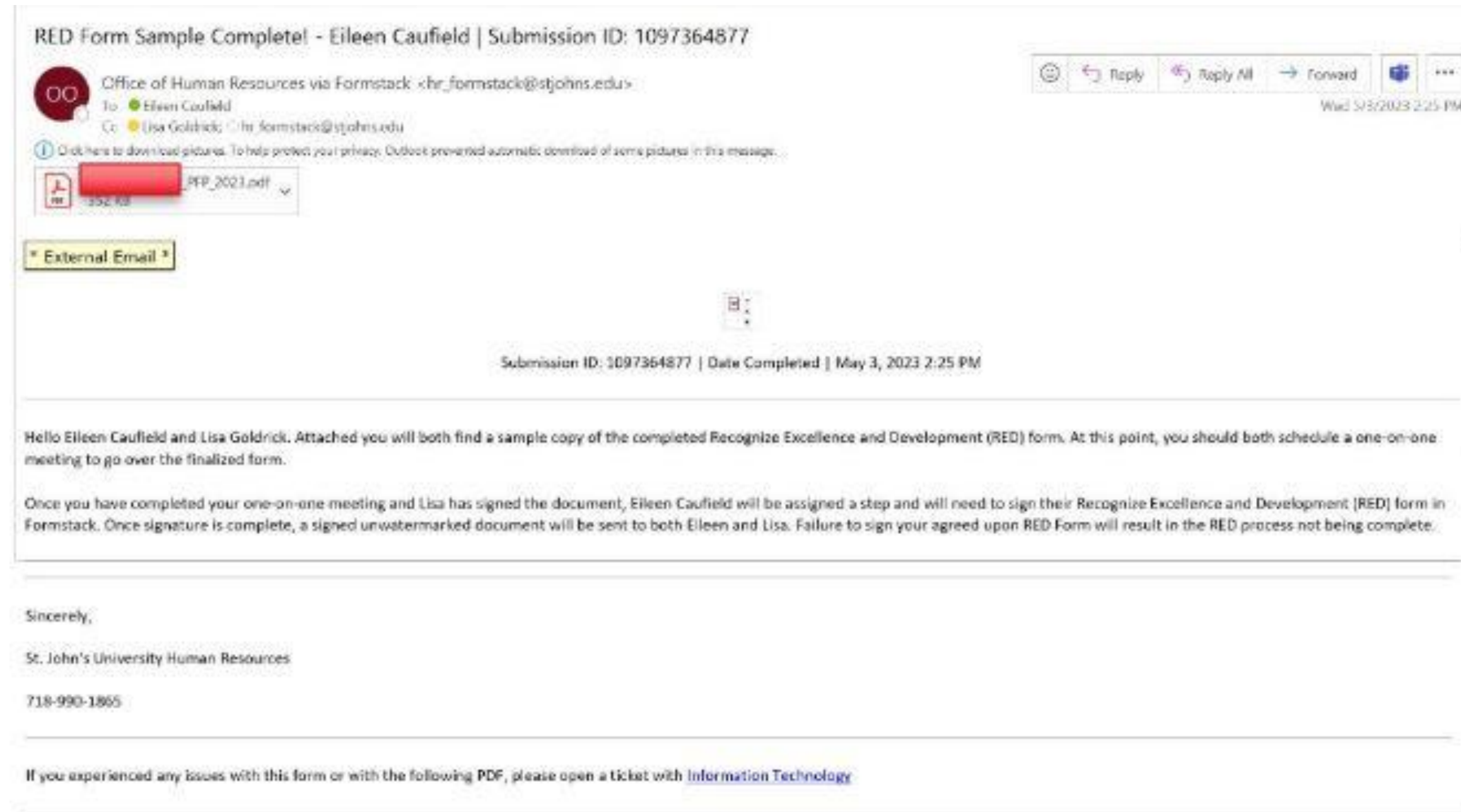
St. John's University Human Resources

718-990-1865



# Email notifying employee that supervisor submitted RED

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 in PDF Format.**



# Sample Copy of RED after Supervisor submits RED Narrative

The sample copy has the **SAMPLE** watermark on the form.

Supervisors are required to schedule a meeting with their direct reports to discuss the RED Form.

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

Employee's Name: Eileen Caufield Title: Associate Director, Training & Development Email: caufiele@stjohns.edu XNumber: [REDACTED]

Supervisor's Name: Lisa Goldrick Title: Director Email: goldricl@stjohns.edu XNumber: [REDACTED]

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

Objectives/Key Responsibilities – 60% overall weighting

| Objectives   | Rating/Weight         |
|--|-----------------------|
| #1 Objective/Key Responsibility:<br>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<br>Weighting: 50%  |
| #2 Objective/Key Responsibility:<br>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. | EP<br>Weighting: 15%  |
| #3 Objective/Key Responsibility:<br>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+<br>Weighting: 15% |
| #4 Objective/Key Responsibility:<br>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<br>Weighting: 10%  |
| #5 Objective/Key Responsibility:<br>Custom Training Facilitation - facilitate customized training workshops as requested.  | PW+<br>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 Inclusivity:            | 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

1 | Page 1097364877 [REDACTED]



# After Review Meeting has been held – Employee Signature Required

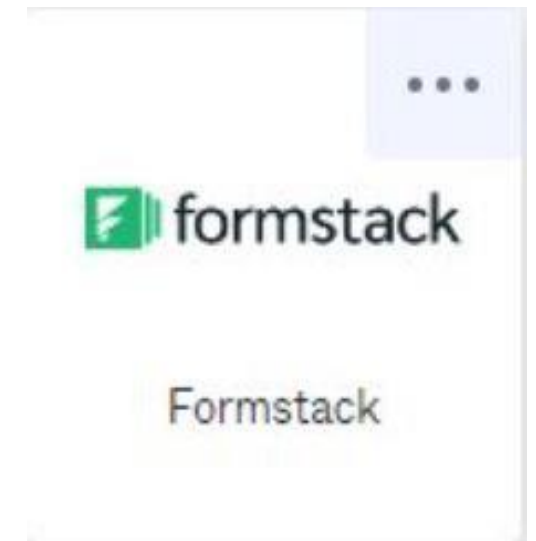
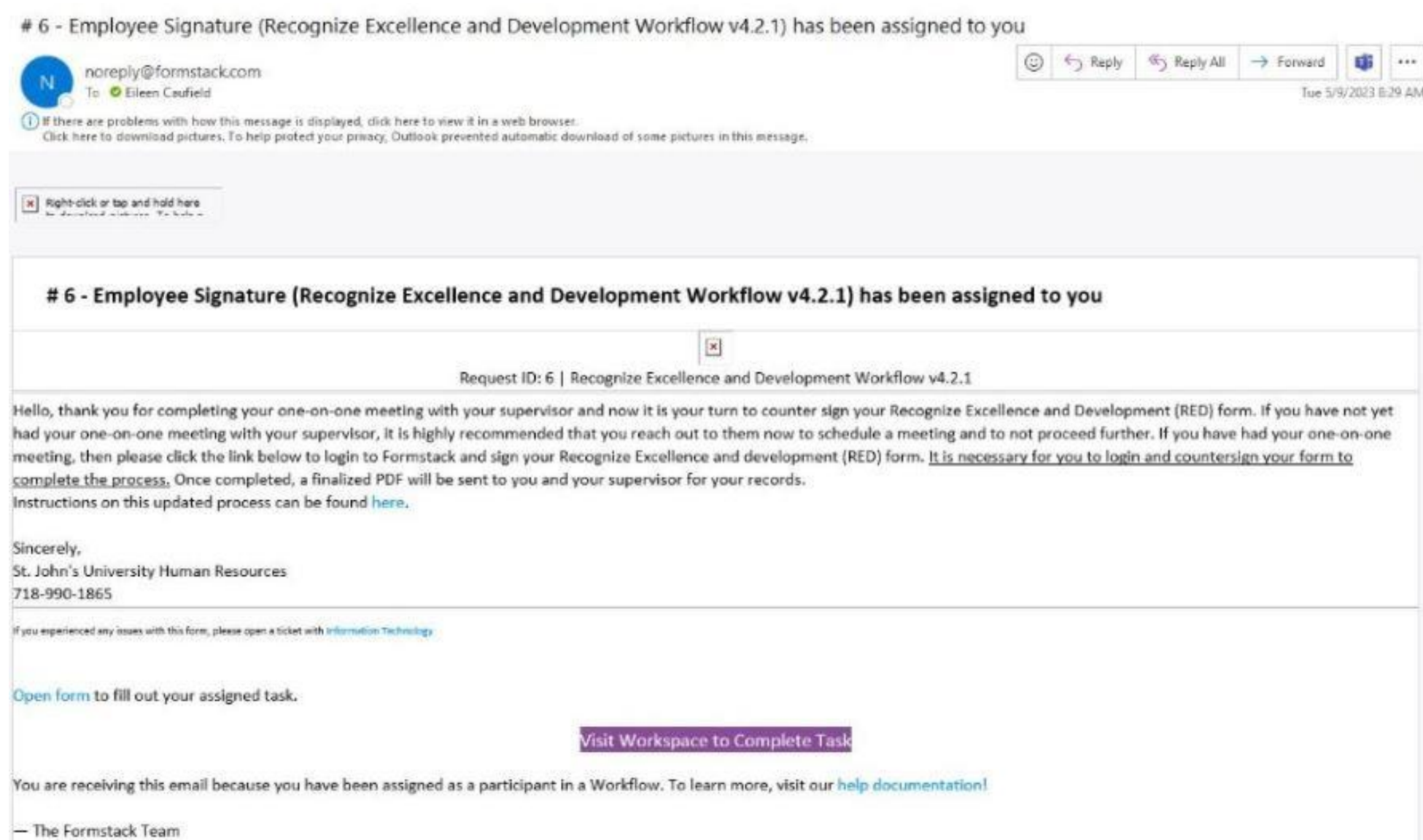


ST. JOHN'S  
UNIVERSITY

After the one-on-one meeting is held, supervisor signs the employee's RED Form, and the employee receives a workflow assignment requesting their signature on the RED.

The employee needs to access the **Formstack Workspace** by clicking on **Visit Workspace to Complete Task** to sign the employee's RED Form.

Or, you can access the **Workspace** by clicking on the **Formstack** tile from the dashboard.





# Logging into Formstack to Sign the RED Form

You may be asked to provide a two-factor authentication code in order to access the Formstack Workspace.

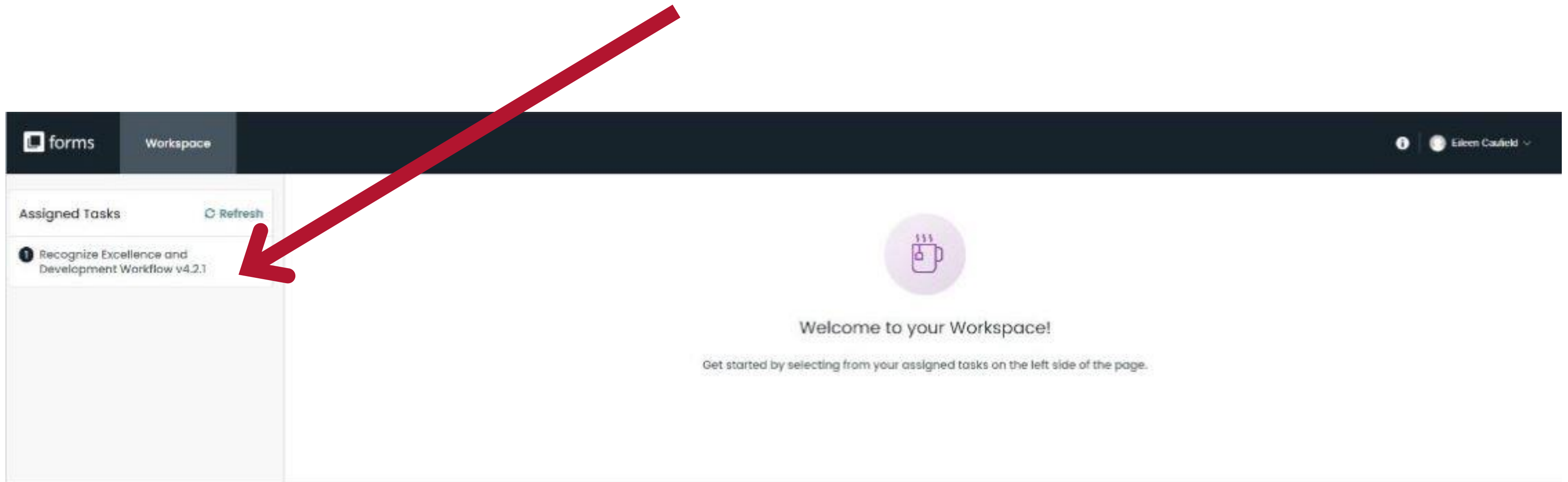
Click on **Send code**, enter **the code** and click on **Verify**.

The screenshot shows a mobile interface for connecting to Formstack. At the top, it says "Connecting to formstack" with a green icon. Below that, it says "Sign-in with your St. John's University account to access Formstack Forms". The main content area features the St. John's University logo at the top, followed by a blue circular icon with "SMS" inside. Below the icon, it says "SMS Authentication" and shows a phone number "(+1 XXX-XXX-6902)". There are two input fields: "Send code" and "Enter Code". Below these fields is a large blue button labeled "Verify". At the bottom right, there is a "Sign Out" link.



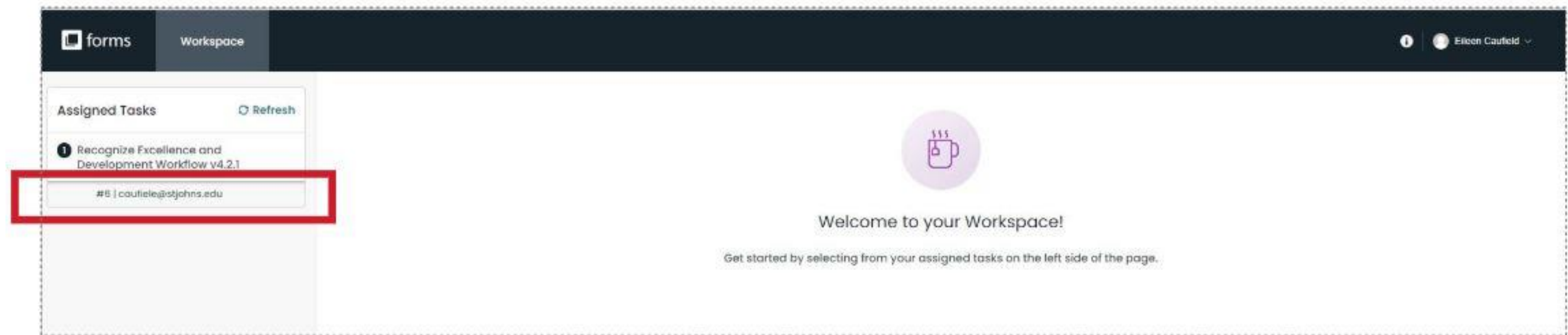
# Logging into Formstack to Sign the RED Form

Click on **Recognize Excellence and Development Workflow** from the Formstack Workspace.



# Logging into Formstack to Sign the RED Form

Click on the Workflow # and email address that corresponds to your RED Form.

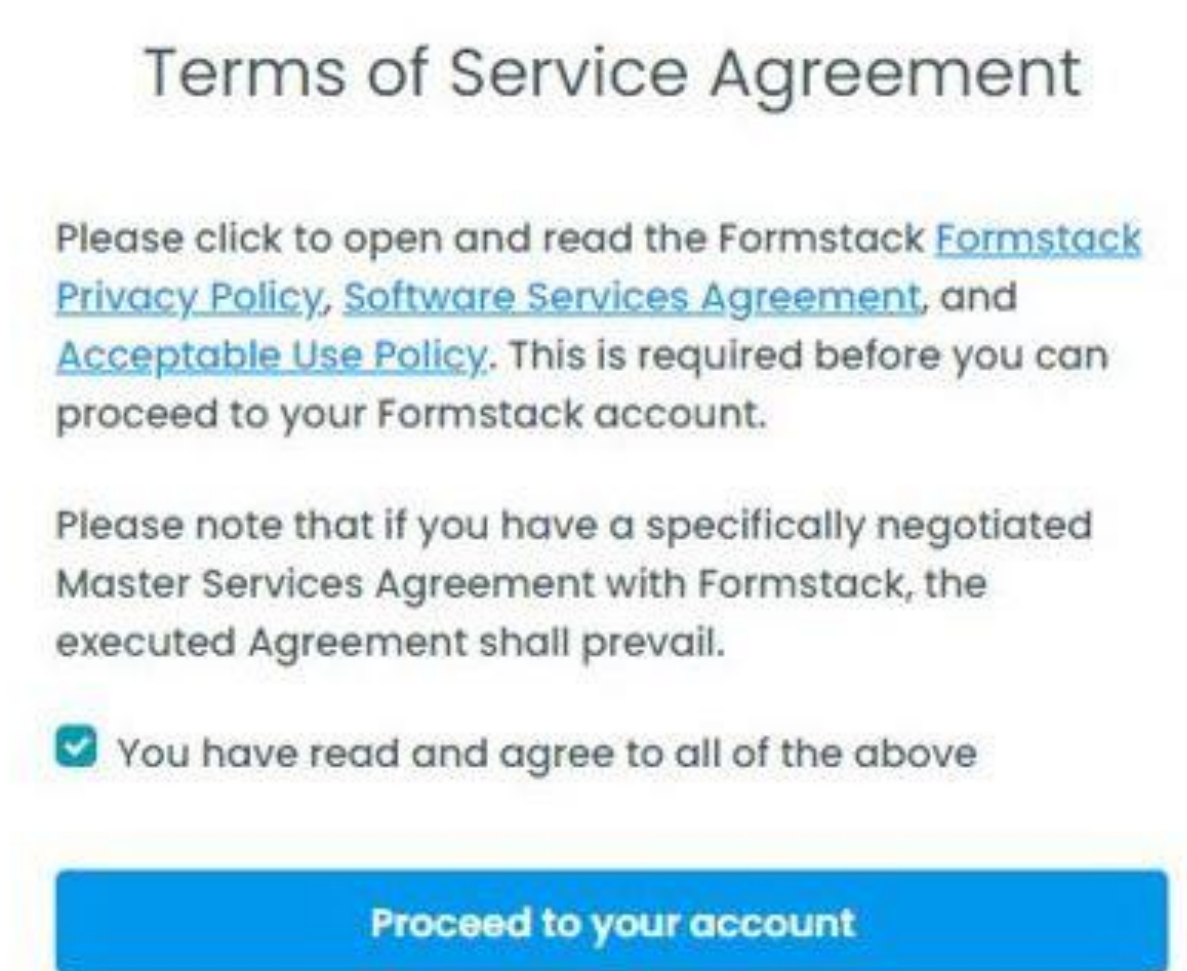




# Logging into Formstack to Sign the RED Form

Before you can access the RED Form, you may be asked to accept Formstack's Terms of Service.

1. Check the box that states, "You have read and agree to all of the above."
2. Click on Proceed to your account



Terms of Service Agreement

Please click to open and read the Formstack [Formstack Privacy Policy](#), [Software Services Agreement](#), and [Acceptable Use Policy](#). This is required before you can proceed to your Formstack account.

Please note that if you have a specifically negotiated Master Services Agreement with Formstack, the executed Agreement shall prevail.

☒ You have read and agree to all of the above

**Proceed to your account**




# Logging into Formstack to Sign the RED Form

While on the screen that displays your RED Form, click on Open Form to open-up the RED Form.

**Notice the workflow is identifying the step as the employee signature**



Assigned Workflow 1 of 1 >>

 **ST. JOHN'S UNIVERSITY**

**WORKFLOW FORM**  
Recognize Excellence and Development Workflow v4.2.1 (#6) > Step 4: Employee Signature

**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



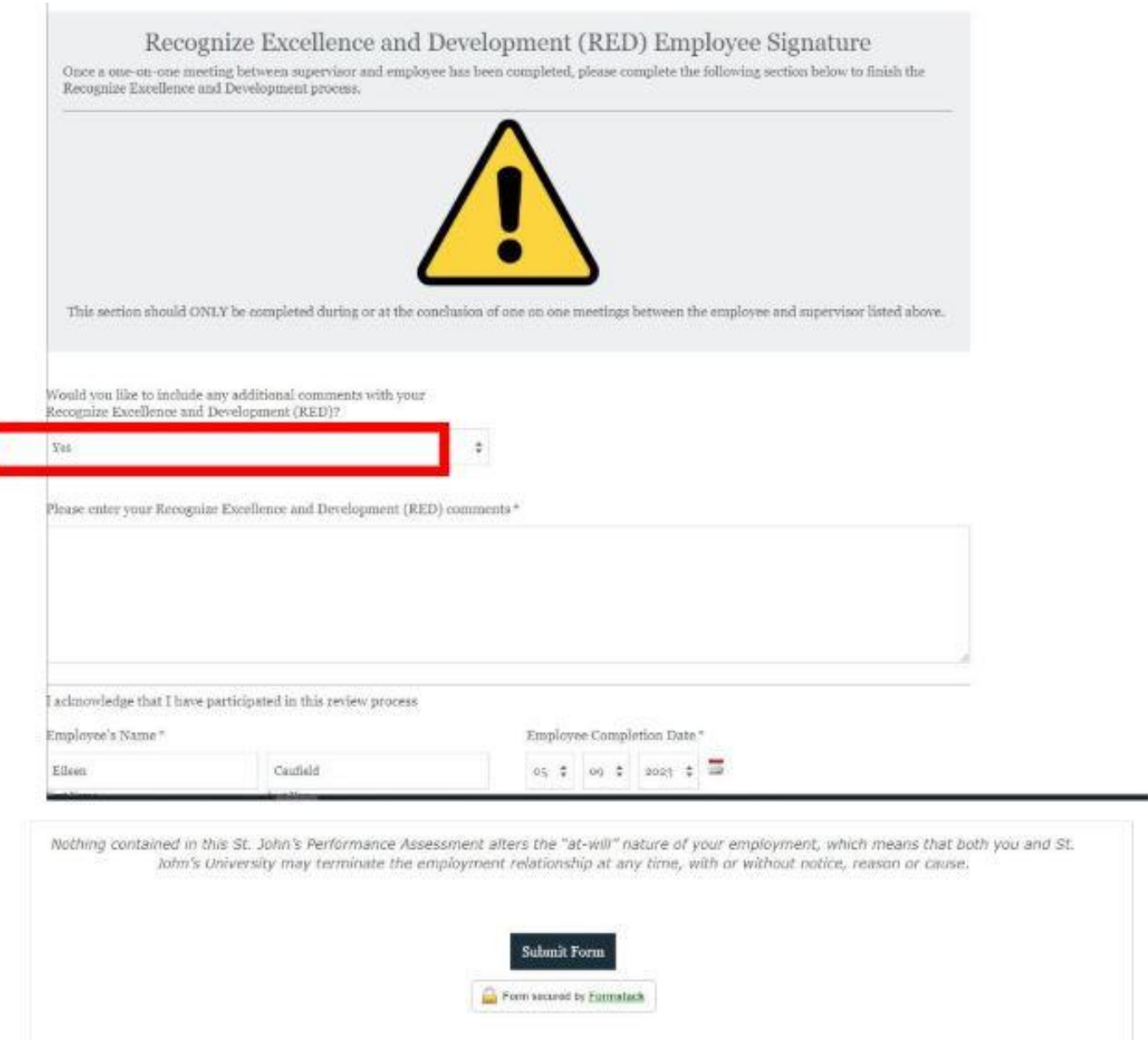
# Logging into Formstack to Sign the RED Form

Scroll through the RED Form until you arrive at the Employee Signature section.

**Note:** At this point you have the option to enter additional comments if you do not agree with the supervisor's comments or wish to provide an additional explanation in response to supervisor's comments.


**If you wish to add comments,**

1. Select **Yes** in response to the question that asks for additional comments
2. Enter comments in the text box
3. Enter **First Name, Last Name, Date of Employee Completion (Signature)**
4. Click on **Submit Form**.



Recognize Excellence and Development (RED) Employee Signature

Once a one-on-one meeting between supervisor and employee has been completed, please complete the following section below to finish the Recognize Excellence and Development process.



This section should ONLY be completed during or at the conclusion of one on one meetings between the employee and supervisor listed above.

Would you like to include any additional comments with your Recognize Excellence and Development (RED)?

☒ Yes

Please enter your Recognize Excellence and Development (RED) comments \*

I acknowledge that I have participated in this review process

Employee's Name \*

Employee Completion Date \*

Nothing contained in this St. John's Performance Assessment alters the "at-will" nature of your employment, which means that both you and St. John's University may terminate the employment relationship at any time, with or without notice, reason or cause.

Form secured by Formstack

**Result:** You will receive confirmation that the form was submitted.



# Logging into Formstack to Sign the RED Form

If you have no additional comments to make, select **No** in response to the question that asks if you would like to include additional comments,


1. Enter **First Name, Last Name,** and **Date** when you complete the form.

2. Click on **Submit Form.**

**Result:** You will receive confirmation that the form was submitted.

Recognize Excellence and Development (RED) Employee Signature

Once a one-on-one meeting between supervisor and employee has been completed, please complete the following section below to finish the Recognize Excellence and Development process.



This section should ONLY be completed during or at the conclusion of one on one meetings between the employee and supervisor listed above.

Would you like to include any additional comments with your Recognize Excellence and Development (RED)?

I acknowledge that I have participated in this review process

Employee's Name \*

First Name:  Last Name:

Employee Completion Date \*

05 09 2023

Nothing contained in this St. John's Performance Assessment alters the "at-will" nature of your employment, which means that both you and St. John's University may terminate the employment relationship at any time, with or without notice, reason or cause.

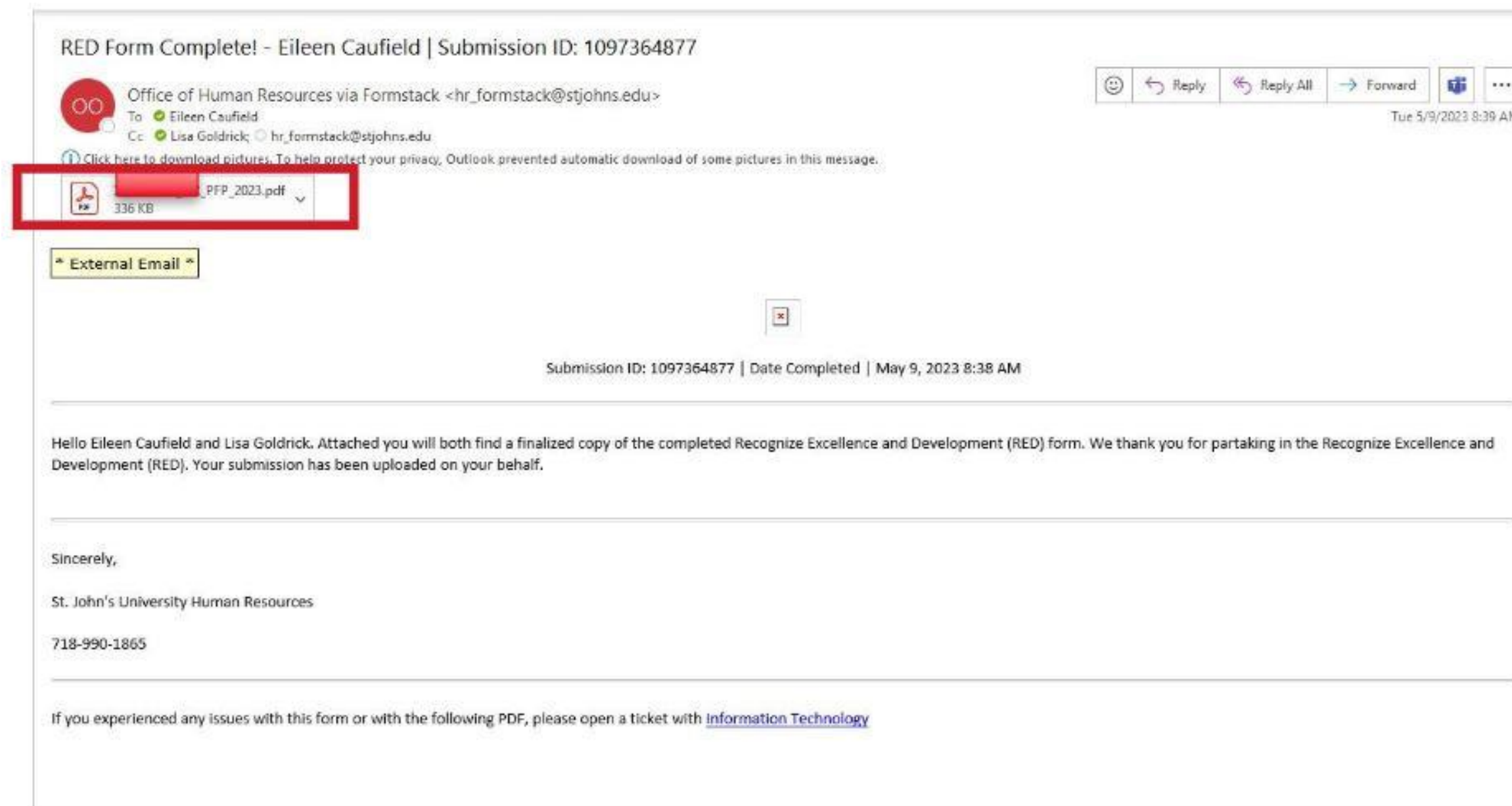
[Submit Form](#)

Form secured by Formstack



# Email Received Transmitting Final Copy of RED

After you sign and submit the RED Form, Formstack sends to both the supervisor and you, the employee, an email notifying you that the process has been completed and Formstack transmits a final copy of the RED to both you and your supervisor.



# Logging into Formstack to Sign the RED Form

In addition to sending a copy of the RED form to the employee and supervisor, copies are also sent to Human Resources and uploaded to Banner Xtender.

We recommend that you **download** a copy of the PDF RED Form and maintain it for your records.

**Recognize Excellence and Development  
(RED)**

Revised 8/4/2022

Employee's Name: [REDACTED] Supervisor's Name: K [REDACTED]  
Title: [REDACTED] Title: [REDACTED]  
Email: [REDACTED] Email: [REDACTED]  
XNumber: [REDACTED] XNumber: [REDACTED]

School or Department: Human Resources  
Periodic Check In Date: Final Assessment Date: 09/20/2022

Objectives/Key Responsibilities – 60% overall weighting

| Objectives   | Rating/Weight        |
|--|----------------------|
| #1 Objective/Key Responsibility:<br>Design and Delivery of 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 overall evaluation ratings of 90% very good/excellent.  | EP<br>Weighting: 50% |
| #2 Objective/Key Responsibility:<br>Training Administration - On a weekly basis, download the online Canvas completion results for the mandatory training programs (annual discrimination for adjuncts, affiliates, full-time faculty and GAS and student workers; Active Shooter for all adjuncts, Emergency Readiness for adjuncts and full-time faculty; Title IX for adjuncts); and the SANS training of Core Security Training, Recertification Training and PI Training on behalf of Information Technology and upload the completions into Banner. Monitor the new hire lists and enroll all new hires into the required training programs. | EP<br>Weighting: 15% |
| #3 Objective/Key Responsibility:<br>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<br>Weighting: 10% |
| #4 Objective/Key Responsibility:<br>Diversity, Equity & Inclusion - participate in the Academic Center for Equity & Inclusion's Inclusive Teaching Institute; conduct monthly discussion sessions for the Equity & Inclusion Cohort members pursuing the Equity & Inclusion Certificate during the winter and spring of 2022.  | EP<br>Weighting: 15% |
| #5 Objective/Key Responsibility:<br>Custom Training Facilitation - facilitate customized training workshops as requested.  | EP<br>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 Inclusivity:            | 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:             | EP  |
| 9. Planning and Strategic Vision: | PW+ |

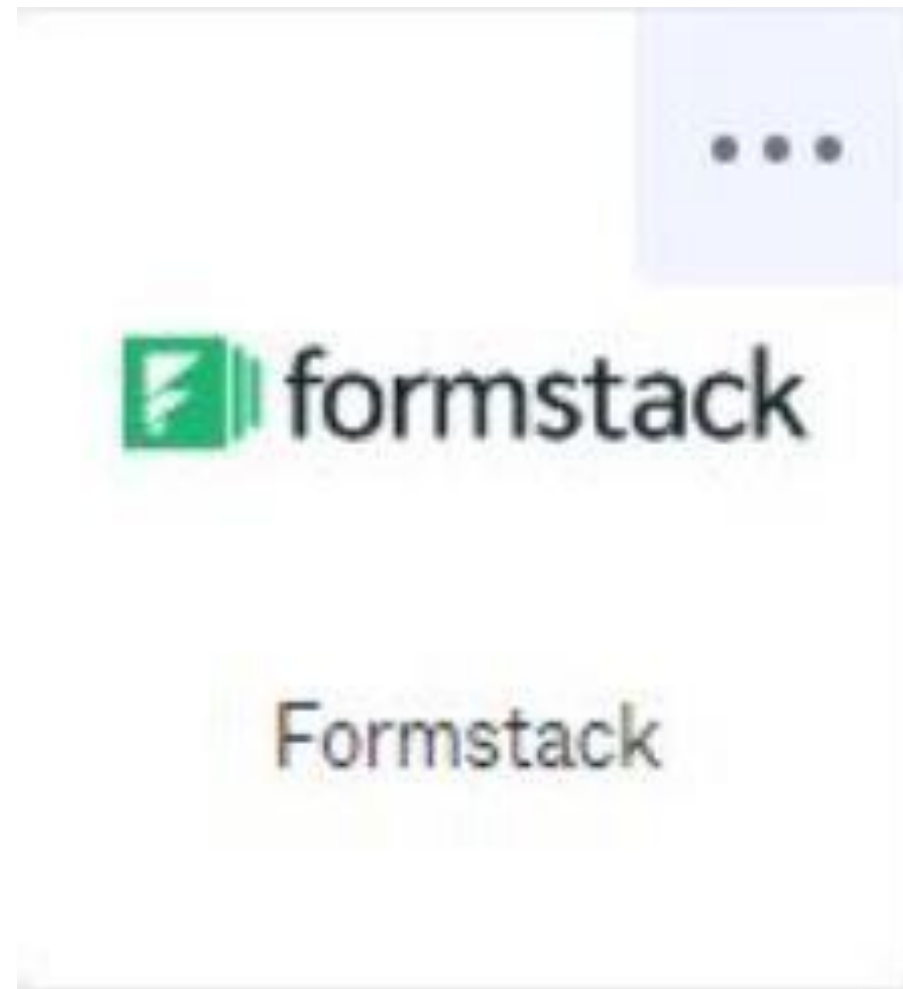
1 | Page

1007151886 [REDACTED]





# Using Formstack to Complete RED Forms for Direct Reports




# Accessing Employee's RED Form via HR Email: Option #1 Click Here

When a direct report submits a completed self-assessment, you will receive an email from the Office of Human Resources informing you that a RED Form has been submitted. You can click on the word **here** in the email to login into your Formstack account.

**Important:** Note the Workflow **ID#** that appears in the email (#6 in the illustration). You will need to select this number in the Formstack Workspace to open-up the employee's RED Form. New this year, the employee's email address will appear next to the Workflow # but not the employee's name.

From: Office of Human Resources via Formstack <formstack@stjohns.edu>  
Sent: Tuesday, May 2, 2023 4:30 PM  
To: Lisa Goldrick <goldrick@stjohns.edu>  
Subject: Eileen Caulfield has completed their Recognize Excellence and Development (RED) Employee Self-Assessment: 6

 **ST. JOHN'S UNIVERSITY**  
Workflow ID: 6 | Date Completed: May 2, 2023 4:30 PM

Hello Lisa Goldrick,  
Eileen Caulfield has completed their Recognize Excellence and Development (RED) Employee Self-Assessment! Below you'll find a copy of their submission for your records. The next phase of the performance evaluation can now be completed. Please go to the following link to begin the Supervisor portion of the review. You can access this, and any other Employee's Recognize Excellence and Development Employee Self-Assessment by clicking [here](#), and logging into your Formstack account with SignOn. Eileen has provided the following Objectives/Key Responsibilities, a weighting for those responsibilities, and a self-evaluation for you to reference during your evaluation. If changes need to be made to objectives submitted by Eileen, please inform them and you can change them in your Formstack Workspace.

Objective/Key Responsibility #1\* at a weighting of 50:

Objective/Key Responsibility #2\* at a weighting of 15:

Objective/Key Responsibility #3\* at a weighting of 15:

Objective/Key Responsibility #4 at a weighting of 10:

Objective/Key Responsibility #5 at a weighting of 10:

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.

Objective #2 - Training Record Administration  
With the move to more online training, there has been an increase in the amount of time devoted to training record administration. As stated in objective #1, the training administration in support of the delivery of the training programs has doubled in work due to the dual structure (in-person and webinar formats) that we have adopted.

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](#).



# Logging into Formstack to Sign the RED Form

You may be asked to provide a two-factor authentication code in order to access the Formstack Workspace.

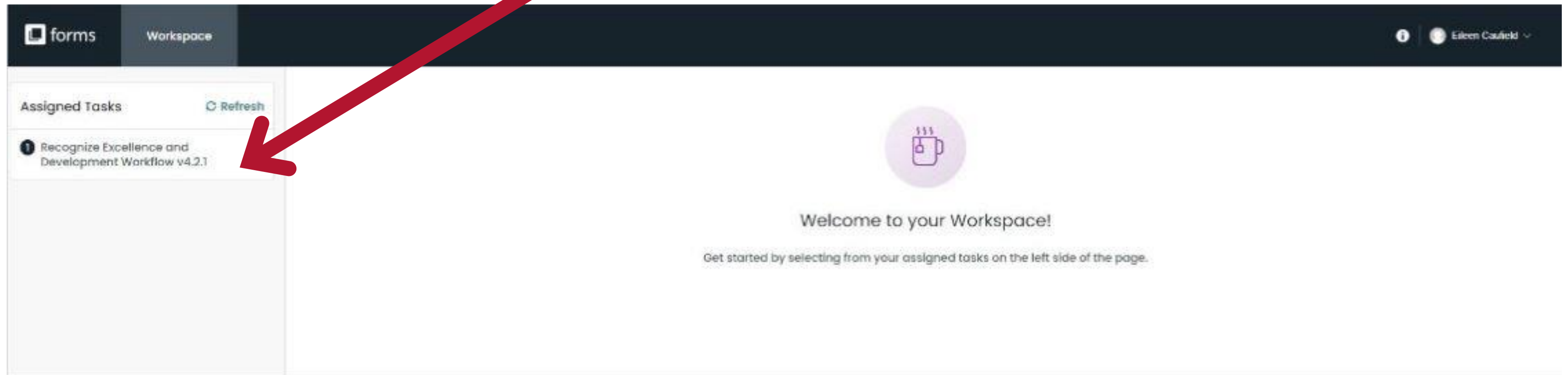
Click on Send code, enter the code and click on Verify.

The screenshot shows a web interface for connecting to Formstack. At the top, it says "Connecting to formstack" with the Formstack logo. Below that, it says "Sign-in with your St. John's University account to access Formstack Forms". The main content area is a white box with the St. John's University logo at the top. In the center is a blue circular icon with a white speech bubble and the text "SMS". Below the icon, it says "SMS Authentication" and "(+1 XXX-XXX-6902)". There are two input fields: one labeled "Send code" and another labeled "Enter Code". Below these fields is a large blue button labeled "Verify". In the bottom right corner of the white box, there is a "Sign Out" link.



# Accessing Employee's RED Form via HR Email: Option #1 Click Here

Click on **Recognize Excellence and Development Workflow** from the Formstack Workspace.

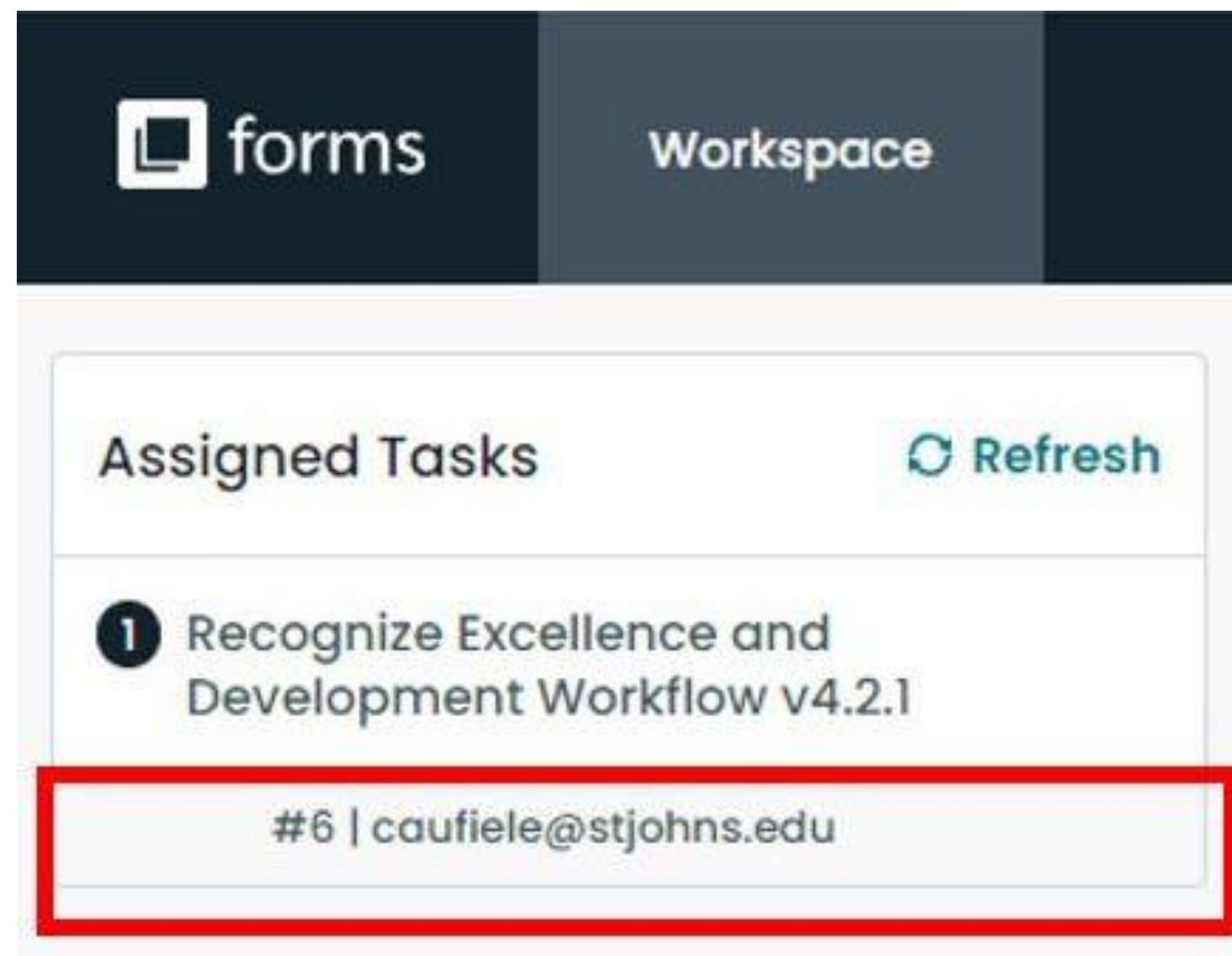


# Accessing Employee's RED Form via HR Email: Option #1

## Click Here

Click on the **# of the assessment** associated with the direct report that completed the RED Form.

**Note:** Click on **#6** since that is the number of the workflow that was contained in the email from HR. This year, the employee's email address is associated with the workflow #.



The screenshot shows a web interface with a dark header bar containing a 'forms' tab and a 'Workspace' tab. Below the header, there is a section titled 'Assigned Tasks' with a 'Refresh' button. A task is listed: '1 Recognize Excellence and Development Workflow v4.2.1'. Below this task, a red rectangular box highlights the text '#6 | caufiele@stjohns.edu'.



# Accessing Employee's RED Form via HR Email: Option #1

## Click Here

### Terms of Service Agreement

Please click to open and read the Formstack [Formstack Privacy Policy](#), [Software Services Agreement](#), and [Acceptable Use Policy](#). This is required before you can proceed to your Formstack account.

Please note that if you have a specifically negotiated Master Services Agreement with Formstack, the executed Agreement shall prevail.

☒ You have read and agree to all of the above

Proceed to your account

Before you can access the employee's RED Form, you will be asked to accept Formstack's Terms of Service.

1. Check the box that states, "You have read and agree to all of the above."
2. Click on Proceed to your account.





# Accessing Employee's RED Form via HR Email: Option #1

## Click Here

The RED Form for the direct report is displayed on the screen. Click on Open Form (upper right of the screen).

The screenshot shows a web application interface for St. John's University. At the top, there is a dark navigation bar with a 'forms' tab and a 'Workspace' tab. On the right of the navigation bar, there is a user profile icon and the name 'Lisa Goldick'. Below the navigation bar, there is a sidebar on the left with the heading 'Assigned Tasks' and a 'Refresh' button. The sidebar contains a task titled 'Recognize Excellence and Development Workflow v4.2.1' with a sub-item '#5 | caufele@stjohns.edu'. The main content area features the St. John's University logo and name. Below the logo, there is a section titled 'WORKFLOW FORM' with the text 'Recognize Excellence and Development Workflow v4.2.1 (#6) > Step 2: Supervisor Assessment'. A prominent red warning message states 'ATTENTION: You Cannot Save This Form' with a note that progress cannot be saved and information will be lost. Below the warning, there is a section titled 'Recognize Excellence and Development (RED) Employee Information' with instructions to click on an icon for the relevant stage of the performance cycle. Two icons are shown: a red arrow pointing right labeled 'BEGINNING OF PERFORMANCE CYCLE' and a red circular arrow with a checkmark labeled 'END OF PERFORMANCE CYCLE'. In the top right corner of the main content area, there is a blue button labeled 'Open Form'.



# Accessing Employee's RED Form via HR Email: Option #1

## Click Here

View the direct report's RED Form and scroll through the form to add your ratings and narrative. **Note:** The employee portion of the RED Form will appear grayed out. **You cannot edit what the employee entered.**



**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.

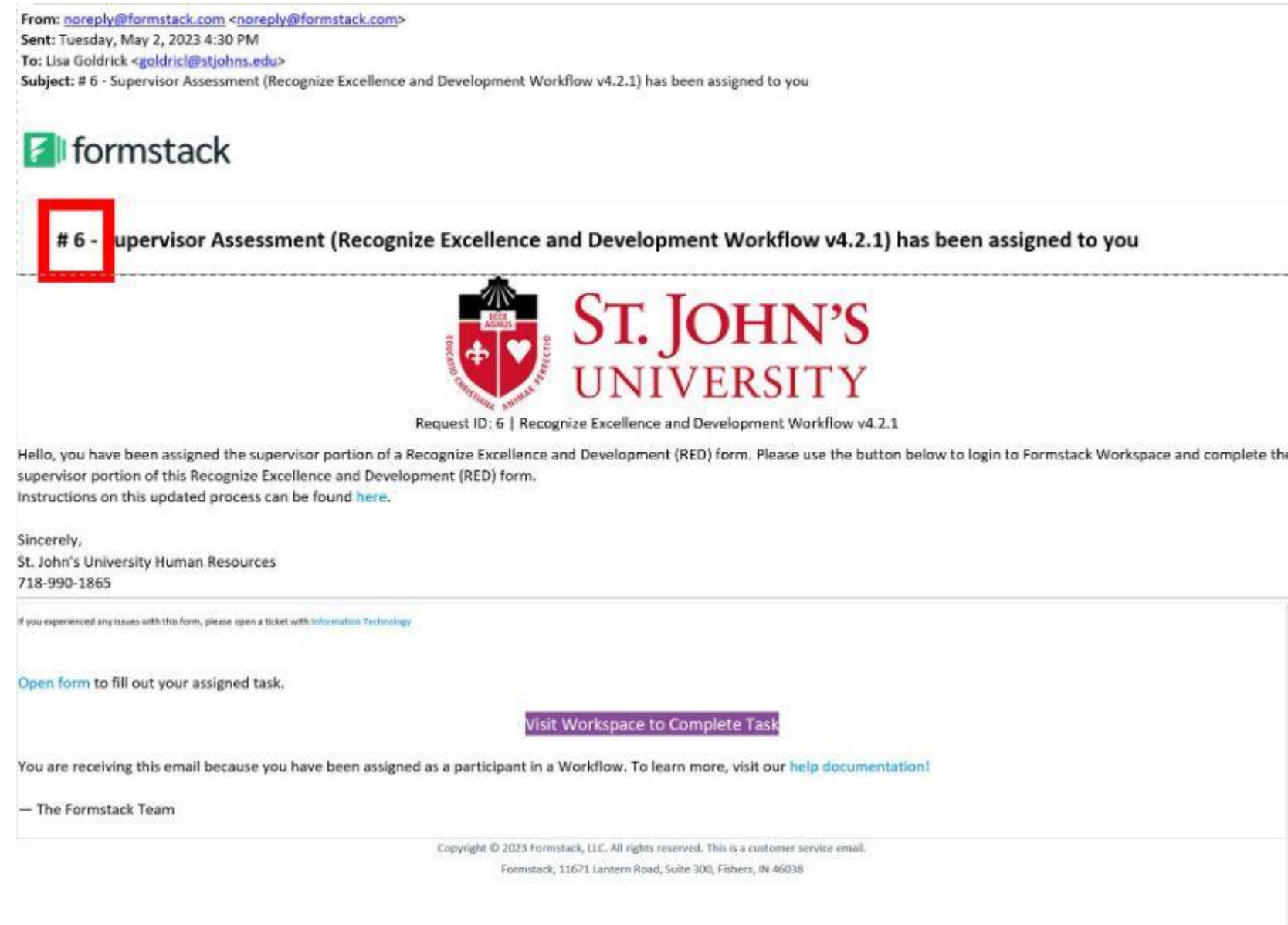
BEGINNING OF PERFORMANCE CYCLE    END OF PERFORMANCE CYCLE

Please complete all information below:

|   |   |   |                               |
|---|---|---|-------------------------------|
| Employee's Name *   | Employee's Title *  | St. John's University Employee Email *            | Employee X-Number *           |
| <input type="text" value="Eileen"/> <input type="text" value="Caufield"/> | <input type="text" value="Associate Director, Training &amp; Development"/>               | <input type="text" value="caufiele@stjohns.edu"/> | <input type="text" value=""/> |
| <small>First Name    Last Name</small>                                    |   |   |                               |
| School or Department *  | Periodic Check In Date  |   |                               |
| <input type="text" value="Human Resources Training &amp; Development"/>   | <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/> |   |                               |

# Accessing Employee's RED Form via Formstack Email: Option #2 Visit Workspace to Complete Task

When a direct report submits a completed self-assessment, you will receive an email from Formstack notifying you that a RED Form has been assigned to you. However, **in the email from Formstack, the name of the direct report does not appear.** You can open the RED Form one of two ways: (1) Click on **Open Form** or (2) Click on **Visit Workspace to Complete Task**. The instructions on the following slides are for **Visit Workspace to Complete Task**, which is an easier way to access the form than the Open Form option.



**Note:** #6 in the red box indicates the number Formstack assigned to the direct report who completed the form. This number corresponds to the number of the assessment that has been assigned to you.



# Logging into Formstack to Sign the RED Form

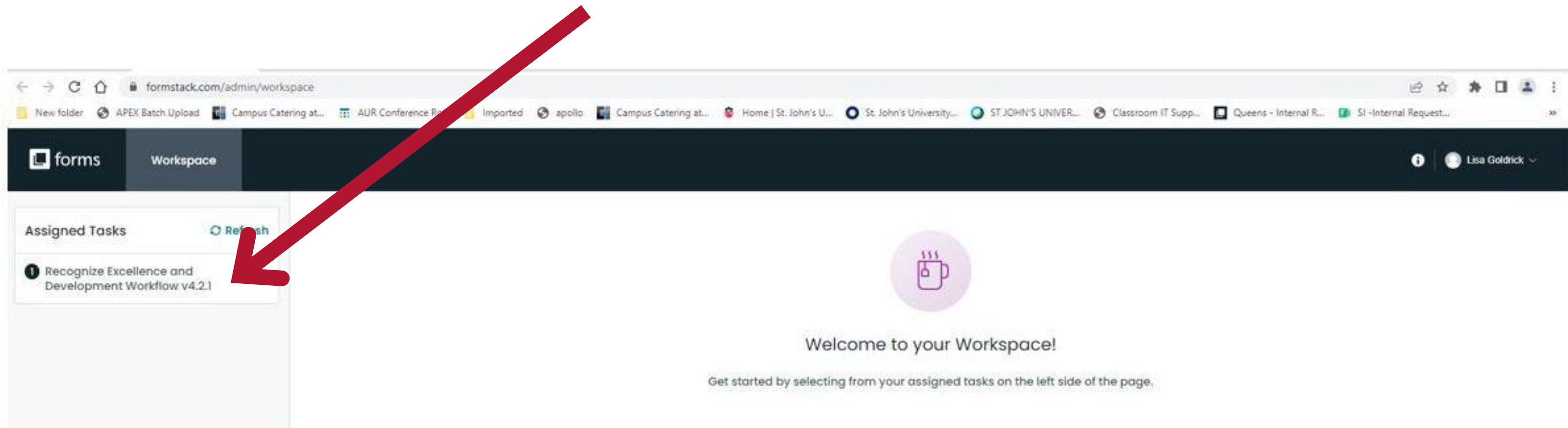
You may be asked to provide a two-factor authentication code in order to access the Formstack Workspace.

Click on Send code, enter the code and click on Verify.

The screenshot shows a web interface for connecting to Formstack. At the top, it says "Connecting to formstack" with the Formstack logo. Below that, it says "Sign-in with your St. John's University account to access Formstack Forms". The main content area is a white box with the St. John's University logo at the top. In the center is a blue circular icon with a white speech bubble and the text "SMS". Below the icon, it says "SMS Authentication" and "(+1 XXX-XXX-6902)". There are two input fields: "Send code" and "Enter Code". Below these fields is a large blue button labeled "Verify". In the bottom right corner of the white box, there is a "Sign Out" link.

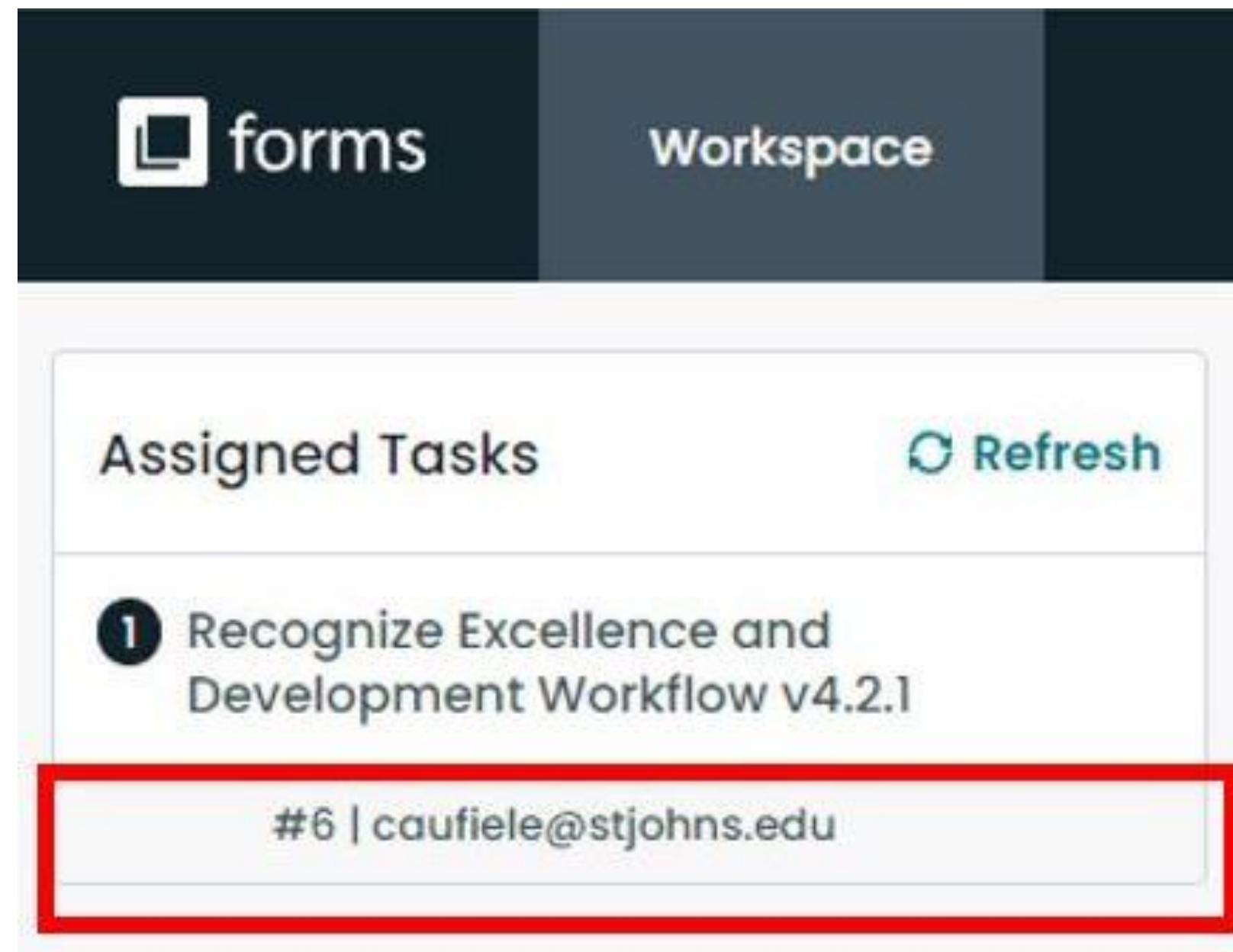
# Accessing Employee's RED Form via Formstack Email: Option #2 Visit Workspace to Complete Task

Click on **Recognize Excellence and Development Workflow v4.2.1** from the Formstack Workspace.



# Accessing Employee's RED Form via Formstack Email: Option #2 Visit Workspace to Complete Task

Click on the **# of the assessment** associated with the direct report that completed the RED Form.  
**Note:** Click on **#6** since that is the number of the workflow and request ID# that was contained in the email from Formstack.  
**Note:** New this year, the employee's email address appears next to the Workflow # associated with their RED Form.



The screenshot shows the Formstack Workspace interface. At the top, there are two tabs: 'forms' and 'Workspace'. The 'Workspace' tab is selected. Below the tabs, there is a section titled 'Assigned Tasks' with a 'Refresh' button. A task is listed: '1 Recognize Excellence and Development Workflow v4.2.1'. Below this task, there is a red-bordered box containing the text '#6 | caufiele@stjohns.edu'.





# Accessing Employee's RED Form via Formstack Email: Option #2 Visit Workspace to Complete Task

Before you can access the employee's RED Form, you will be asked to accept Formstack's Terms of Service.

1. Check the box that states, "You have read and agree to all of the above."
2. Click on Proceed to your account.

## Terms of Service Agreement

Please click to open and read the Formstack [Formstack Privacy Policy](#), [Software Services Agreement](#), and [Acceptable Use Policy](#). This is required before you can proceed to your Formstack account.

Please note that if you have a specifically negotiated Master Services Agreement with Formstack, the executed Agreement shall prevail.

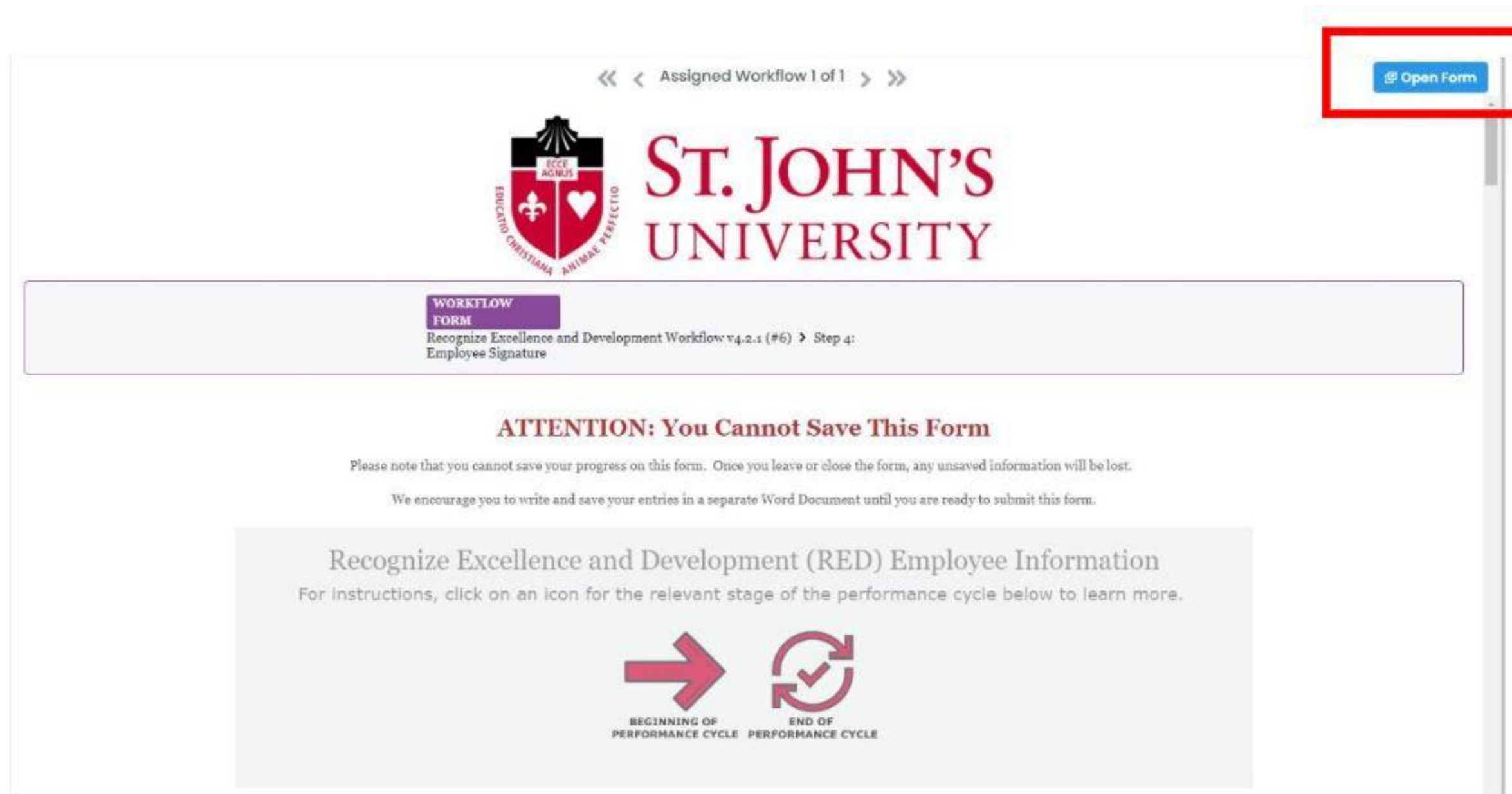
☒ You have read and agree to all of the above

Proceed to your account



# Accessing Employee's RED Form via Formstack Email: Option #2 Visit Workspace to Complete Task

The RED Form for the direct report is displayed on the screen. Click on Open Form (upper right of the screen).



The screenshot shows a web interface for St. John's University. At the top, there is a navigation bar with the text "Assigned Workflow 1 of 1" and a blue button labeled "Open Form" in the upper right corner, which is highlighted with a red rectangle. Below the navigation bar is the St. John's University logo and name. A purple box labeled "WORKFLOW FORM" contains the text "Recognize Excellence and Development Workflow v4.2.1 (#6) > Step 4: Employee Signature". Below this, a red warning message states: "ATTENTION: You Cannot Save This Form". A note below the warning says: "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." The main content area is titled "Recognize Excellence and Development (RED) Employee Information" and includes the instruction: "For instructions, click on an icon for the relevant stage of the performance cycle below to learn more." Below this instruction are two icons: a red arrow pointing right labeled "BEGINNING OF PERFORMANCE CYCLE" and a red circular arrow with a checkmark labeled "END OF PERFORMANCE CYCLE".



# Accessing Employee's RED Form via Formstack Email: Option #2 Visit Workspace to Complete Task

View the direct report's RED Form and scroll through the form to add your ratings and narrative.

**Note:** The employee portion of the RED Form will appear grayed out. **You cannot edit what the employee entered.**



**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 *  |
| <input type="text" value="Eileen"/> <input type="text" value="Caufield"/> | <input type="text" value="Associate Director, Training &amp; Develo"/> | <input type="text" value="caufiele@stjohns.edu"/> | <input type="text"/> |
| <small>First Name</small> <small>Last Name</small>                        |  |   |                      |
| School or Department *  | Periodic Check In Date   |   |                      |
| <input type="text" value="Human Resources Training &amp; Develo"/>        | <input type="text"/> <input type="text"/> <input type="text"/>         |   |                      |





# **Completing the RED Form for a Direct Report**

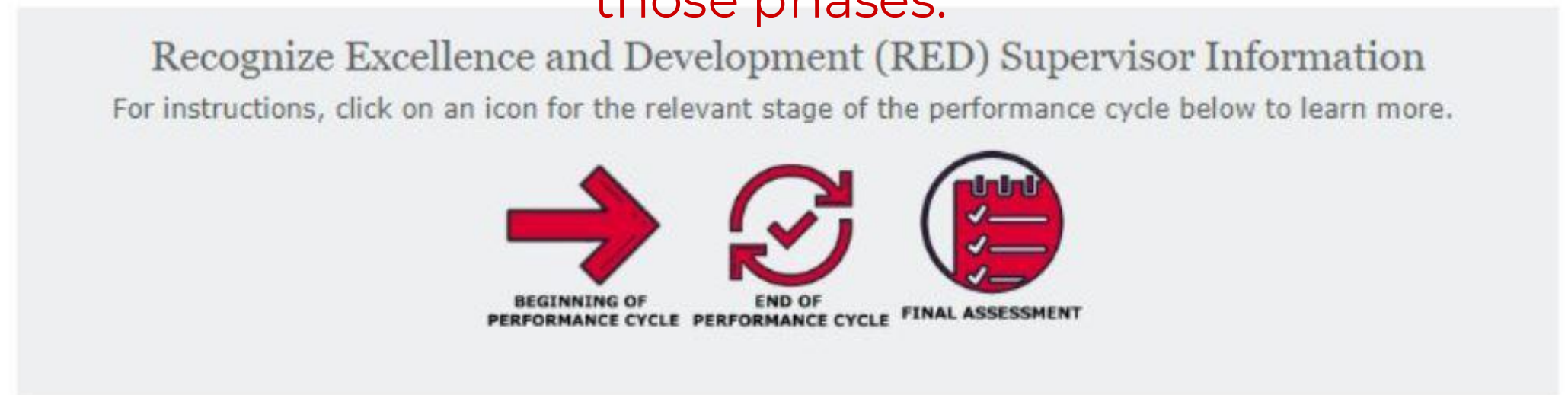


# Adding Supervisor's Personal Information

On the direct report's RED Form, you will be asked to enter your personal information, that is, your

- first and last name,
- position title,
- email address (you will be asked to confirm your email address)
- XID number
- department (select from the drop-down menu)
- skip the periodic check-in date
- enter the date of the assessment, for the year-end assessment enter 05/31/yyyy.

Note: 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 instructions for each of those phases.



Please complete all information below:

|   |                                       |   |  |   |
|---|---------------------------------------|---|--|---|
| Supervisor's Name *   |                                       | Supervisor's Title *  | Supervisor's Email *   | Supervisor X-Number *   |
| <input type="text" value="Lisa"/>   | <input type="text" value="Goldrick"/> | <input type="text" value="Assoc. Director"/>  | <input type="text" value="goldricl@stjohns.edu"/>                    | <input type="text" value="x"/>  |
| <small>First Name Last Name</small>   |                                       |   | Confirm Supervisor's Email *   |   |
|   |                                       |   | <input type="text" value="goldricl@stjohns.edu"/>                    |   |
|   |                                       |   | <small>Please enter your St. John's University email address</small> |   |
| School or Department *  |                                       | Periodic Check In Date  |  | Final Assessment Date   |
| <input type="text" value="Human Res."/>   |                                       | <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/> |  | <input type="text" value="05"/> <input type="text" value="31"/> <input type="text" value="2023"/> |
| <small>If your department is not listed, please select "Other Department" at the bottom of the list</small> |                                       |   |  |   |



# Entering Objectives Weighting & Rating

For each of your direct report's objectives, enter the weighting of the objective and your rating on it. **Note:** The weighting must equal 100%.

**Reminder:** The system will automatically assign a rating based on the weight of the objective and the rating. In this example a rating of **EP** is assigned.

Objectives/Key Responsibilities - 60% overall weighting  
Click the relevant icon below for tips on how to complete this section:



BEGINNING OF PERFORMANCE CYCLE



RATING DESCRIPTIONS

**Note:** If you click on the images for the **Beginning of Performance Cycle and Rating Descriptions**, you will be brought to the instructions for each of those phases.

|  |   |  |
|--|---|--|
| #1 Objective/Key Responsibility *  | #1 Objective/Key Responsibility Weighting (%) * | #1 Objective/Key Responsibility Rating * |
| 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.   | 50  | EP                                       |
| #2 Objective/Key Responsibility *  | #2 Objective/Key Responsibility Weighting (%) * | #2 Objective/Key Responsibility Rating * |
| Training Administration - Weekly, download the online Canvas completion results for the mandatory training programs (discrimination, Active Shooter Preparedness, Emergency Readiness, Title IX) and the RANS 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. | 15  | EP                                       |
| #3 Objective/Key Responsibility *  | #3 Objective/Key Responsibility Weighting (%) * | #3 Objective/Key Responsibility Rating * |
| 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.   | 15  | PRC                                      |
| #4 Objective/Key Responsibility *  | #4 Objective/Key Responsibility Weighting (%) * | #4 Objective/Key Responsibility Rating * |
| 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.  | 10  | EP                                       |
| #5 Objective/Key Responsibility *  | #5 Objective/Key Responsibility Weighting (%) * | #5 Objective/Key Responsibility Rating * |
| Custom Training Facilitation - facilitate customized training workshops as requested.  | 10  | PRC                                      |
| Weighting must equal 100% *  |   |  |
| 100  |   |  |
| Overall Year-end Rating Scale: Objectives & Key Responsibilities:  |   |  |



# Completing the Competency Section

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.

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:** Click on **Employee Competencies** for a description of each of the competencies.



# Completing the Competency Section

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

|   |  |   |  |
|---|--|---|--|
| <b>1. Provide Timely and Excellent Service:</b>   | Please select a rating for Timely and Excellent Service: *   | <b>5. Collegiality and Teamwork:</b>  | Please select a rating for Collegiality and Teamwork * |
|   | EP   | <i>Works collaboratively and respectfully within and across departments.</i>                | PW   |
| <b>2. Diversity and Inclusivity:</b>  | Please select a rating for Diversity and Inclusivity: *      | <b>6. Communication:</b>  | Please select a rating for Communication *             |
| <i>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.</i> | PW+  | <i>Communicates clearly, concisely, and respectfully in all interactions.</i>               | PW+  |
| <b>3. Shared Ownership/Accountability:</b>  | Please select a rating for Shared Ownership/Accountability * | <b>7. Quality of Work:</b>  | Please select a rating for Quality of Work *           |
| <i>Understands and takes responsibility for individual role in achieving department/university-wide objectives.</i>   | PW+  | <i>Provides accurate complete products and services</i>                                     | PW+  |
| <b>4. Adapting to Change:</b>   | Please select a rating for Adapting to Change *              | <b>Overall Year-end Rating Scale: Competencies / St. John's mission and values at work:</b> |  |
| <i>Demonstrates resiliency. Maintains effectiveness when faced with changes in direction, priorities, schedules, and responsibilities.</i>  | PW   | PW+   |  |

# Overall Rating

The Final Rating for both the objective and competency sections is 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:

PW+



# Professional Development Plan

Purpose: To provide employees with an opportunity for professional growth and to assist those who may be struggling with recommendations for ways to develop needed skills and knowledge.



**Note:** Click on the **Professional Development** icon to access a description of the Professional Development Plan and its purpose.



# Professional Development Plan

On the direct reports' RED Form, enter if the employee completed their Professional Development Plan. Verify that the employee completed the actions within the time frame identified. Also, think of additional development opportunities to add to the employee's RED Form for the next year.

| Professional Development Plan   |                        |                                |
|---|------------------------|--------------------------------|
| Click the icon below for tips on how to complete this section                       |                        |                                |
|  |                        |                                |
| Skills/knowledge/abilities to be developed (or improved)                            | Action steps/Timeframe | Results/Actions taken          |
| Complete LinkedIn Learning course on Articulate                                     | By March 30, 2025      | Completed by February 14, 2025 |
| Learned how to do VLookup in Excel  | By December 30, 2024   | Completed by December 9, 2024  |

**Note:** The employee will provide you with information on the development plan completed.



# Supervisor's Summary

**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. However, it is recommended that supervisors address each objective and competency.

**Note:** Click on the Rating Descriptions for a description of the ratings and behavioral descriptors associated with each rating.



## Supervisor's Summary

Objective #1 – Design and Develop training – XXXX effectively designed and delivered several new training programs this past year on xxxxx and yyyy. Over 100 people were trained in the new programs. XXXX continues to deliver the programs in both the in-person and webinar formats. A total of xxxx number of people completed training.

Objective #2 – Training administration. XXXX Met the objective. They continue to effectively manage the training program.

## Competencies

Timely and Excellent Service – XXXX excels at meeting deadlines and providing service to all staff members.





# Supervisor's Summary

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

**Result:** You will receive confirmation that the form was submitted.

Submit Form

Form secured by [Formstack](#)



ST. JOHN'S  
UNIVERSITY



Thank You

The form was submitted successfully.

# Supervisor's Summary

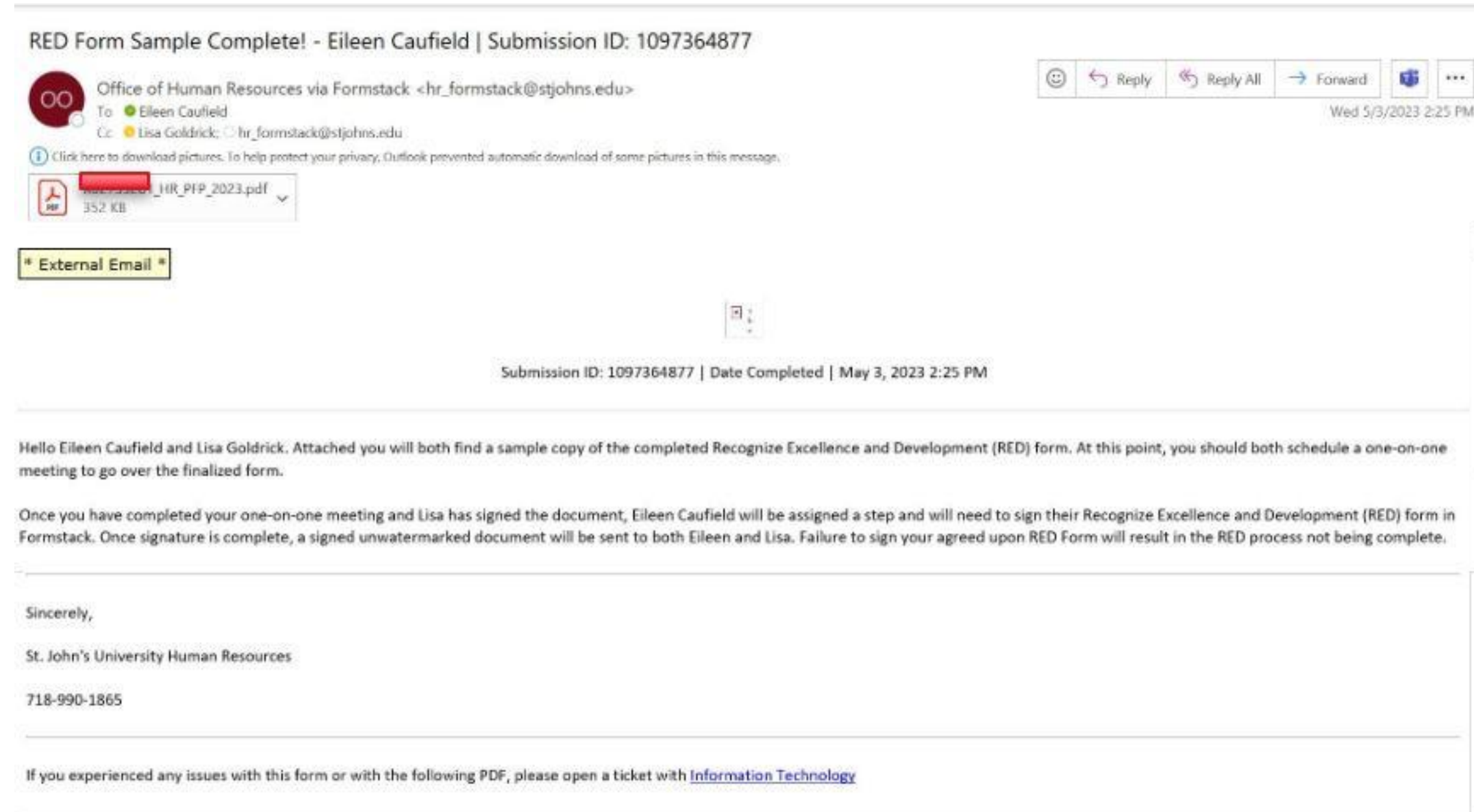
Upon completion of the Supervisor's Summary, click **Submit Form**.

Submit Form



Form secured by **Formstack**

Formstack sends you and your direct report an email that the Supervisor submitted their ratings and narrative to the employee. Both receive a sample copy of the RED Form..



# Sample Copy of RED after Supervisor submit summary

Sample copy of the RED Form contains the **SAMPLE** watermark. 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  
Title: Associate Director, Training & Development  
Email: caulfele@stjohns.edu  
XNumber: [REDACTED]

Supervisor's Name: Lisa Goldrick  
Title: Director  
Email: goldricl@stjohns.edu  
XNumber: [REDACTED]

School or Department: Human Resources  
Periodic Check In Date:

Final Assessment Date: 05/31/2023

Objectives/Key Responsibilities – 60% overall weighting

| Objectives   | Rating/Weight         |
|--|-----------------------|
| #1 Objective/Key Responsibility:<br>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<br>Weighting: 50%  |
| #2 Objective/Key Responsibility:<br>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. | EP<br>Weighting: 15%  |
| #3 Objective/Key Responsibility:<br>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+<br>Weighting: 15% |
| #4 Objective/Key Responsibility:<br>Strategic Planning and People Management - Manage the training budge 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<br>Weighting: 10%  |
| #5 Objective/Key Responsibility:<br>Custom Training Facilitation - facilitate customized training workshops as requested.  | PW+<br>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 Inclusivity:            | 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

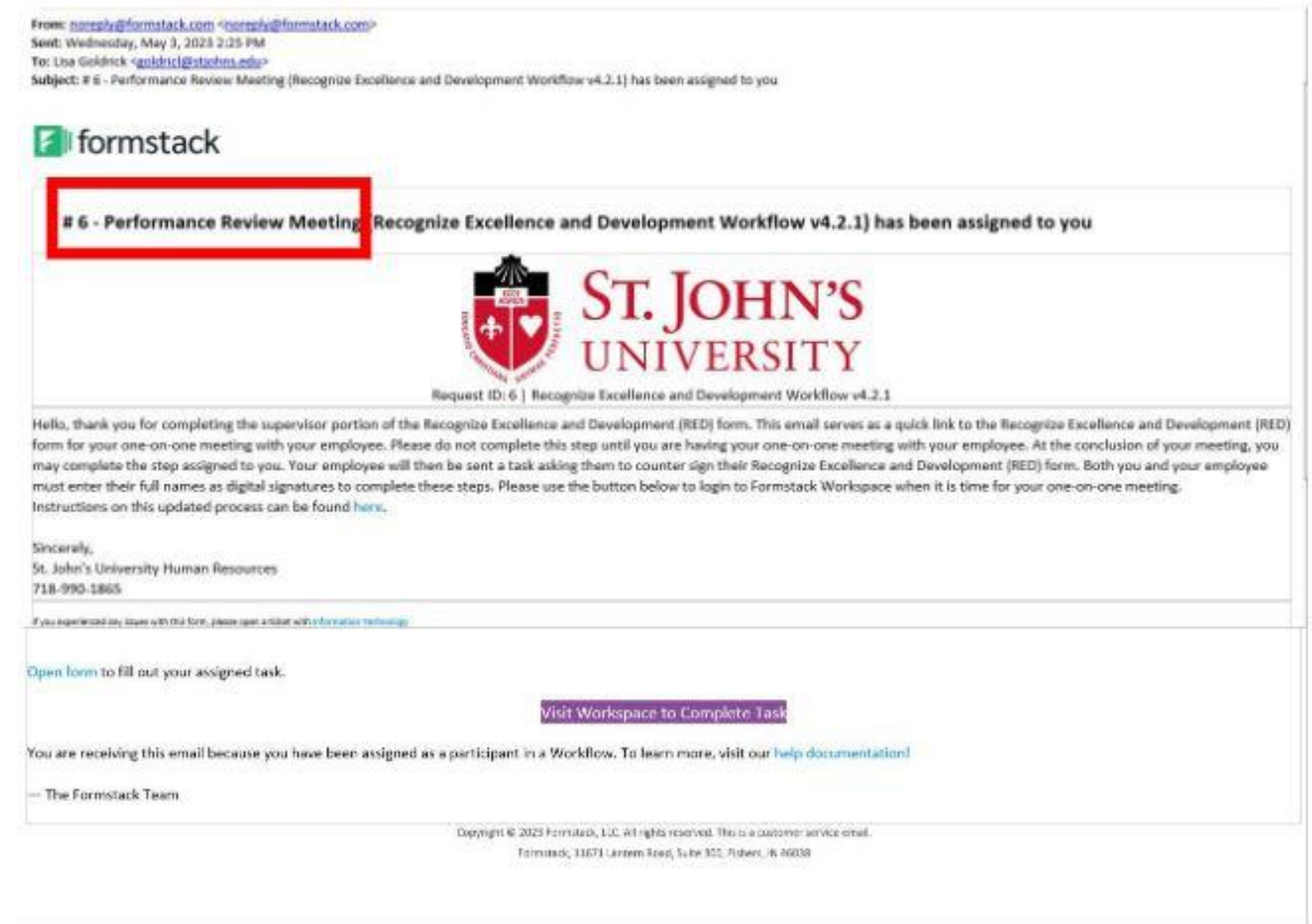
1 | Page

105736487 [REDACTED]



# Notice that a Review Meeting has been assigned

After the supervisor submits the RED Form to the employee, Formstack sends to the supervisor an email notifying them that they have an additional workflow to complete (one-on-one meeting with employee). **The workflow, in this case the Performance Review Meeting, will remain open until both the supervisor & employee sign the RED Form.**




# Notice that a Review Meeting has been assigned

After the meeting, the supervisor needs to access the **Formstack Workspace** by clicking on **Visit Workspace** to sign the employee's RED Form.


**Note:** One can access the **Workspace** by clicking on the **Formstack** tile from the dashboard.

Log into Formstack and access the Workflow ID# (6) assigned to the direct report.

From: [noreply@formstack.com](mailto:noreply@formstack.com) <[noreply@formstack.com](mailto:noreply@formstack.com)>  
Sent: Wednesday, May 3, 2023 2:25 PM  
To: Lisa Goldrick <[goldrick@stjohns.edu](mailto: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

Copyright © 2023 Formstack, LLC. All rights reserved. This is a customer service email.  
Formstack, 11671 Lantern Road, Suite 300, Fishers, IN 46038



# Logging into Formstack to Sign the RED Form

You may be asked to provide a two-factor authentication code in order to access the Formstack Workspace.

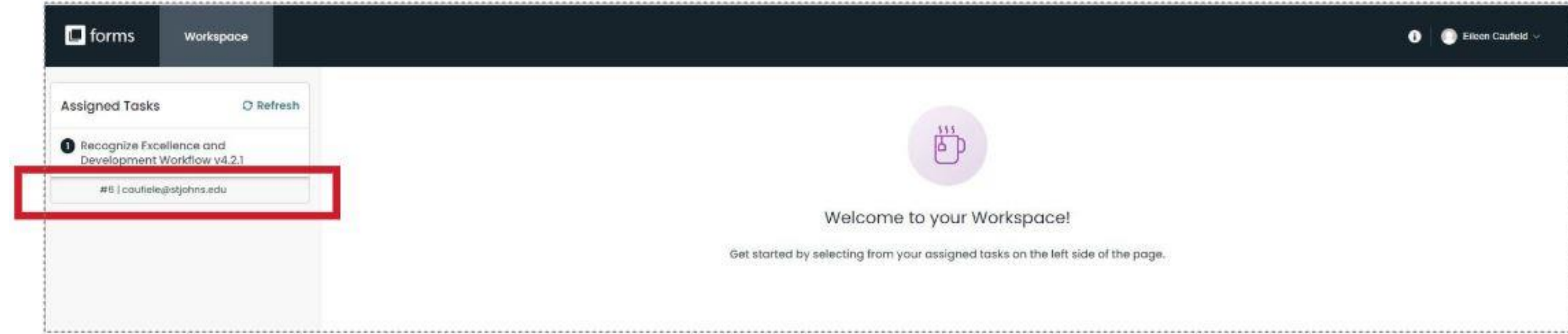
Click on **Send code**, enter **the code** and click on **Verify**.

The screenshot shows a web interface for connecting to Formstack. At the top, it says "Connecting to formstack" with a green icon. Below that, it says "Sign-in with your St. John's University account to access Formstack Forms". The main content area is a white box with a light gray border. Inside, at the top, is the St. John's University logo. Below the logo is a blue circular icon with a white speech bubble and the text "SMS". Underneath the icon, it says "SMS Authentication" and "(+1 XXX-XXX-6902)". There are two input fields: one labeled "Send code" and another labeled "Enter Code". Below these fields is a large blue button labeled "Verify". In the bottom right corner of the white box, there is a "Sign Out" link.



# Accessing Employee's RED Form via Formstack Email: Option #2 Visit Workspace to Complete Task

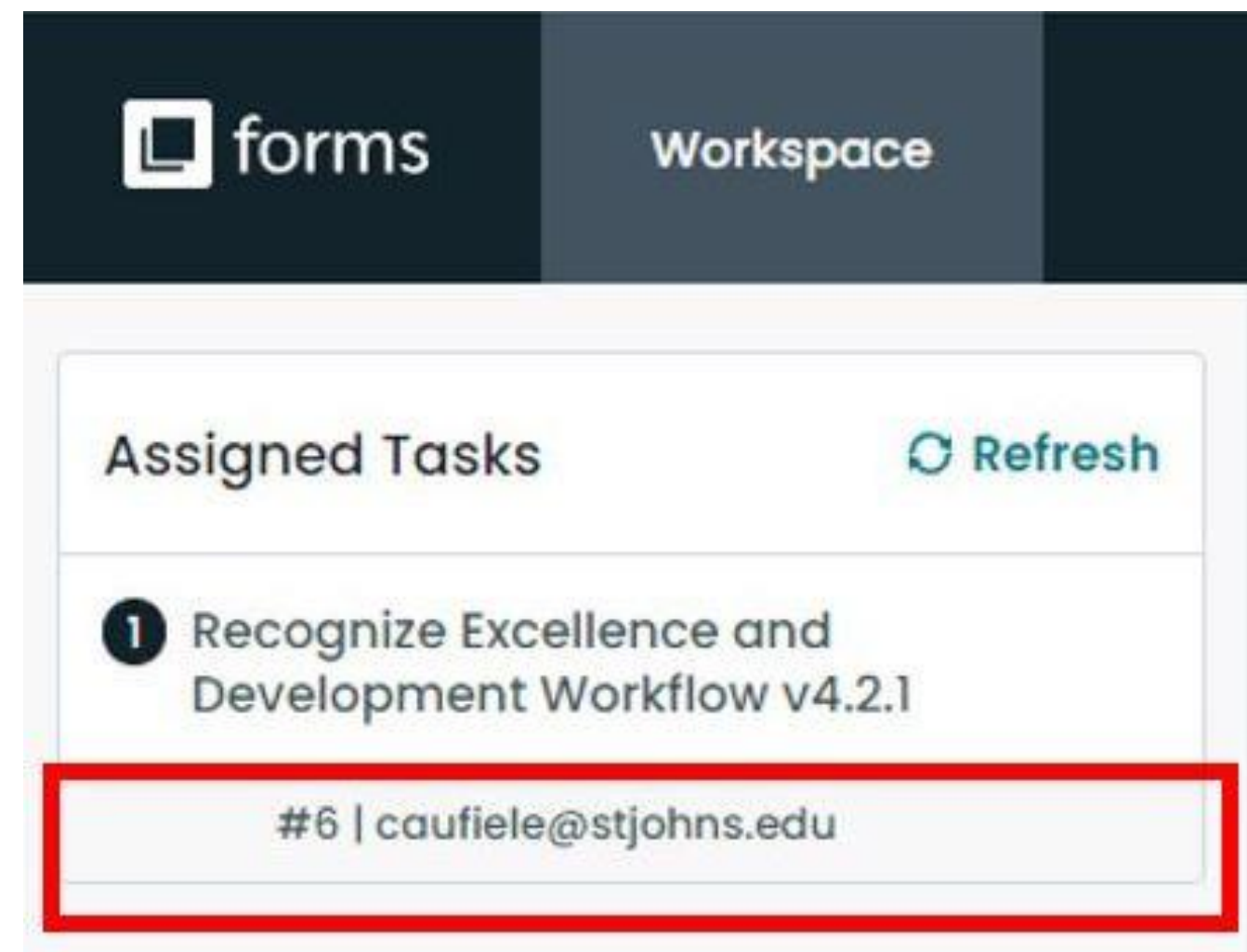
Click on **Recognize Excellence and Development Workflow** from the Formstack Workspace.



# Accessing Employee's RED Form via Formstack Email: Option #2 Visit Workspace to Complete Task

Click on the **# of the assessment** associated with the direct report that completed the RED Form.

**Note:** Click on **#6** since that is the number of the workflow and request ID# that was contained in the email from Formstack.



# Accessing Employee's RED Form via Formstack Email: Option #2 Visit Workspace to Complete Task

The RED Form for the direct report is displayed on the screen. Click on **Open Form** (upper right of the screen).

The screenshot displays the Formstack workspace interface. On the left sidebar, under 'Assigned Tasks', there is a task titled 'Recognize Excellence and Development Workflow v4.2.1' with a link to '#51.cou/telegstjohns.edu'. The main content area features the St. John's University logo and a 'WORKFLOW FORM' section for 'Recognize Excellence and Development Workflow v4.2.1 (#6) > Step 2: Supervisor Assessment'. A prominent warning message states 'ATTENTION: You Cannot Save This Form' with a note that progress cannot be saved and information will be lost. Below this, a section titled 'Recognize Excellence and Development (RED) Employee Information' provides instructions to click on icons for the relevant stage of the performance cycle. Two icons are shown: a red arrow pointing right for 'BEGINNING OF PERFORMANCE CYCLE' and a red circular arrow with a checkmark for 'END OF PERFORMANCE CYCLE'. In the top right corner of the workspace, there is a blue button labeled 'Open Form'.



# After Review Meeting has been held – Supervisor Signature Required

After the supervisor and employee conduct the one-on-one review meeting, the supervisor should access the Formstack Workspace to sign the employee's RED Form.


Supervisor enters their **First Name, Last Name and Date** you are signing the form, if different from the date you conducted the meeting.

Click on **Submit Form.**

**Result:** You will receive confirmation that the form was submitted.

Recognize Excellence and Development (RED) Supervisor Signatures

Once a one-on-one meeting between supervisor and employee has been completed, please complete the following section below to finish the Recognize Excellence and Development process.



This section should ONLY be completed during or at the conclusion of one on one meetings between the employee and supervisor listed above.

Supervisor's Name \*

First Name:  Last Name:

Supervisor Completion Date \*

05 09 2023

Nothing contained in this St. John's Performance Assessment alters the "at-will" nature of your employment, which means that both you and St. John's University may terminate the employment relationship at any time, with or without notice, reason or cause.

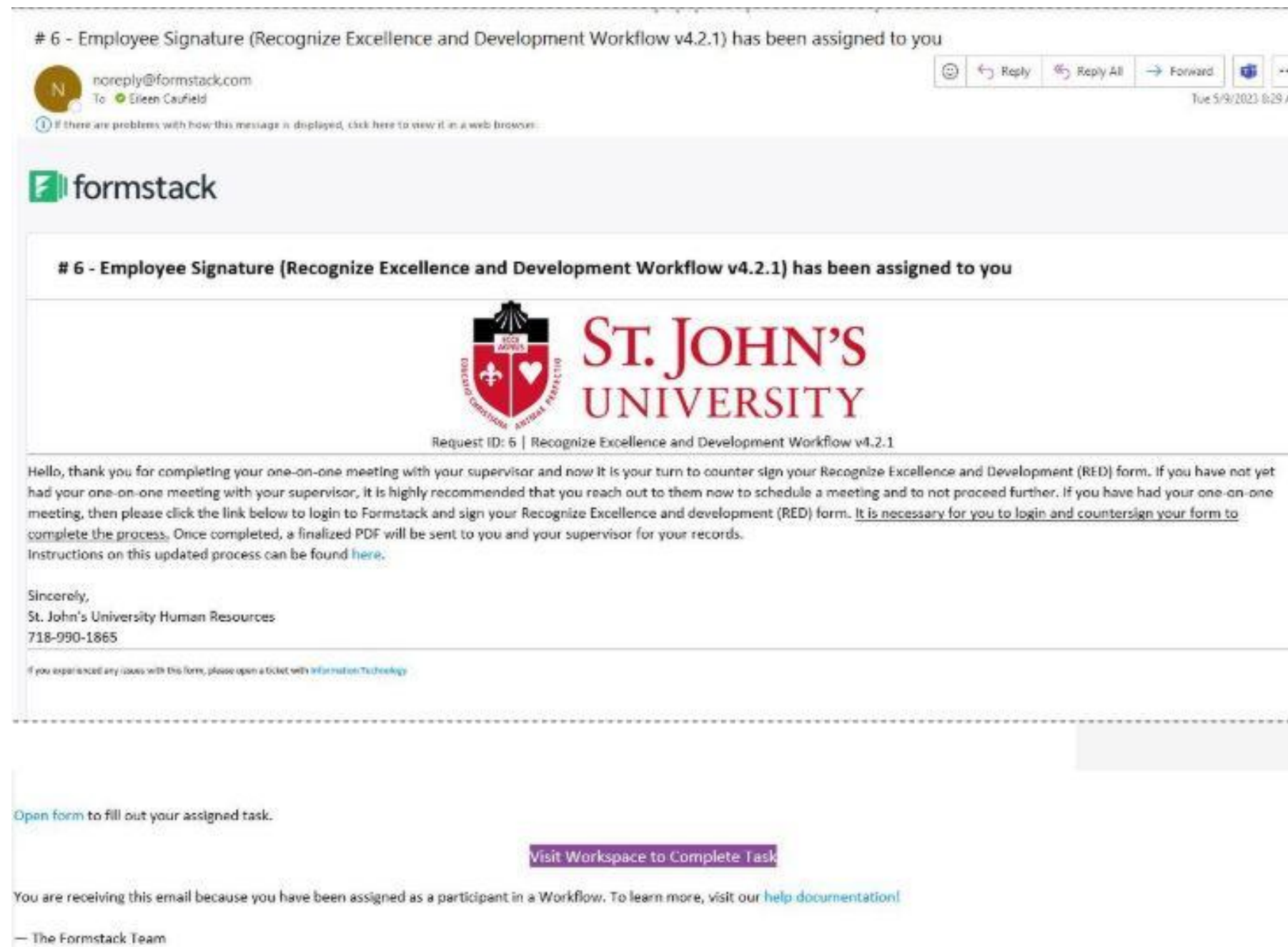
[Submit Form](#)

Form secured by [Formstack](#)



# After Review Meeting has been held – Employee Signature Required

After the supervisor signs the employee's RED Form, the **employee** receives a workflow assignment requesting their signature on the RED.



The employee needs to access the **Formstack Workspace** by clicking on **Visit Workspace to Complete Task** to sign the employee's RED Form.

**Note: Alternatively**, one can access the **Workspace** by clicking on the **Formstack** tile from the dashboard.

# After Review Meeting has been held – Employee Signature Required

After the employee receives the email that the supervisor signed the RED Form, the employee is asked to sign the form.

**Note:** At this point, the employee has the option to enter additional comments if they do not agree with the supervisor's comments or wish to provide additional explanations in response to supervisor's comments.

Recognize Excellence and Development (RED) Employee Signature

Once a one-on-one meeting between supervisor and employee has been completed, please complete the following section below to finish the Recognize Excellence and Development process.



This section should ONLY be completed during or at the conclusion of one on one meetings between the employee and supervisor listed above.

Would you like to include any additional comments with your Recognize Excellence and Development (RED)?

Yes

Please enter your Recognize Excellence and Development (RED) comments \*

I acknowledge that I have participated in this review process

Employee's Name \* Employee Completion Date \*

Eileen Caufield 05 09 2023

## If employee wishes to add comments,

1. Select **Yes** in response to the question that asks for additional comments
2. Enter comments
3. Enter **First Name, Last Name, Date of Employee Completion (Signature)**
4. Click on **Submit Form**.





# After Review Meeting has been held – Employee Signature Required

If the employee has no additional comments to make, select **No** in response to the question that asks if you would like to include additional comments,

1. Employee enters **First Name, Last Name**, and **Date** when employee signs the form.
2. Click on **Submit Form**.

**Result:** You will receive confirmation that the form was submitted.

The screenshot shows a web form titled "Recognize Excellence and Development (RED) Employee Signature". Below the title is a yellow warning triangle icon. The form contains a dropdown menu with "No" selected, a text area for comments, and fields for "Employee's Name" and "Employee Completion Date". A "Submit Form" button is at the bottom, along with a "Form secured by Formstack" watermark.

Recognize Excellence and Development (RED) Employee Signature

Once a one-on-one meeting between supervisor and employee has been completed, please complete the following section below to finish the Recognize Excellence and Development process.

This section should ONLY be completed during, or at the conclusion of one on one meetings between the employee and supervisor listed above.

Would you like to include any additional comments with your Recognize Excellence and Development (RED)?

No

Please enter your Recognize Excellence and Development (RED) comments\*

I acknowledge that I have participated in this review process.

Employee's Name\*

Employee Completion Date\*

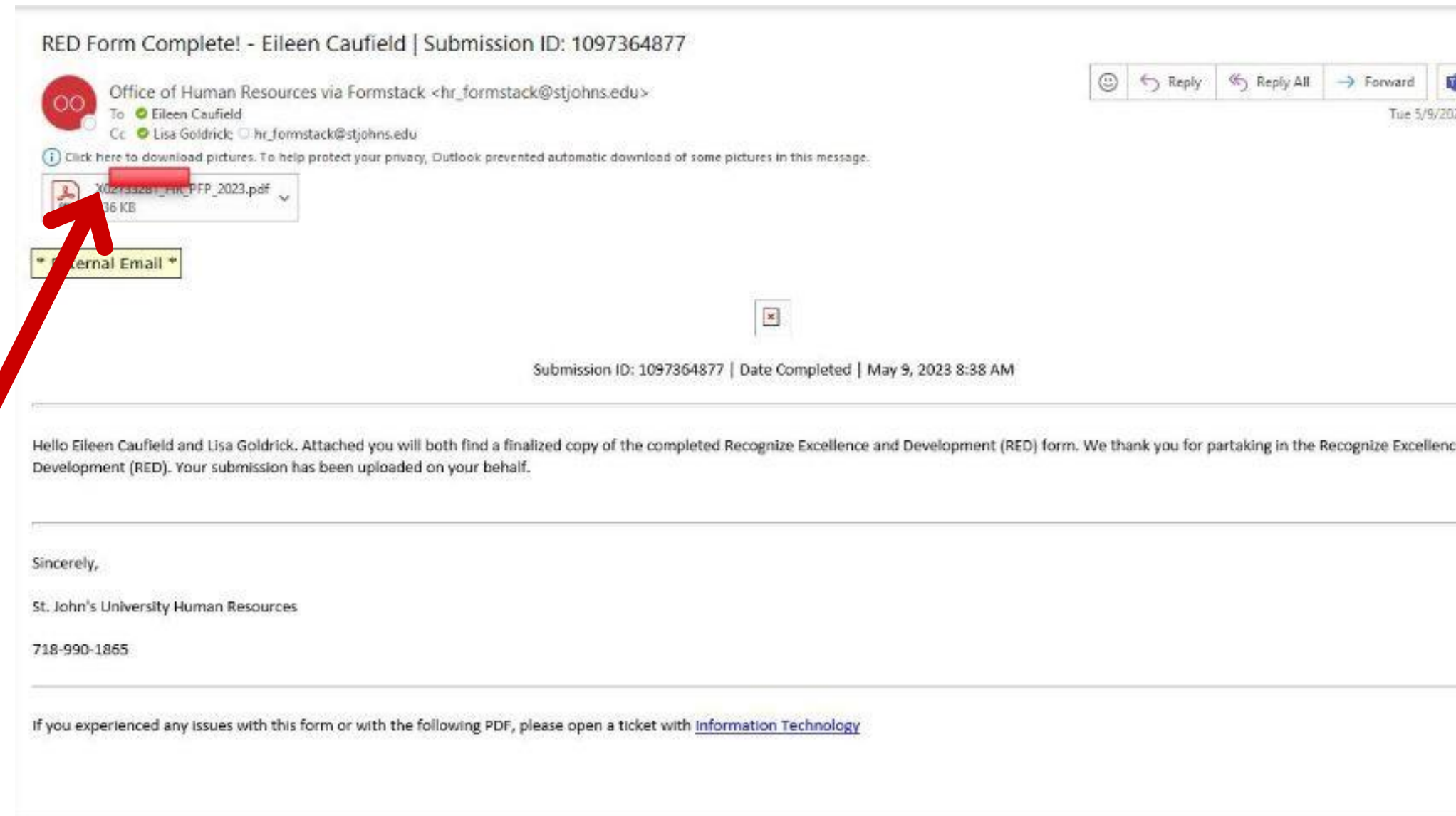
Nothing contained in this St. John's Performance Assessment alters the "at-will" nature of your employment, which means that both you and St. John's University may terminate the employment relationship at any time, with or without notice, reason or cause.

Submit Form

Form secured by Formstack

# Email Received Transmitting Final Copy of RED

After the employee signs and submits the RED Form, Formstack sends to both the supervisor and the employee an email notifying them that the process has been completed and transmits a final copy of the RED



# Email Received Transmitting Final Copy of RED

Final copies of the RED Form are also sent to Human Resources and uploaded to Banner Xtender.

Human Resources will upload the ratings into Banner, the supervisor does not need to enter ratings into UIS.

**Recognize Excellence and Development  
(RED)**

Revised 8/4/2022

Employee's Name: [REDACTED]  
Title: [REDACTED]  
Email: [REDACTED]  
XNumber: [REDACTED]

Supervisor's Name: [REDACTED]  
Title: [REDACTED]  
Email: [REDACTED]  
XNumber: [REDACTED]

School or Department: Human Resources  
Periodic check in Date: [REDACTED]

Final Assessment Date: 09/20/2022

Objectives/Key Responsibilities – 60% overall weighting

| Objectives  | Rating/Weight        |
|---|----------------------|
| #1 Objective/Key Responsibility:<br>Design and Delivery of 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 overall evaluation ratings of 90% very good/excellent.   | EP<br>Weighting: 50% |
| #2 Objective/Key Responsibility:<br>Training Administration - On a weekly basis, download the online Canvas completion results for the mandatory training programs (annual discrimination for adjuncts, affiliates, full-time faculty and Gas and student workers; Active Shooter for all adjuncts, Emergency Readiness for adjuncts and full-time faculty; Title IX for adjuncts); and the SAHS training of Core Security Training, Recertification Training and PII Training on behalf of Information Technology and upload the completions into Banner. Monitor the new hire lists and enroll all new hires into the required training programs. | EP<br>Weighting: 15% |
| #3 Objective/Key Responsibility:<br>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<br>Weighting: 10% |
| #4 Objective/Key Responsibility:<br>Diversity, Equity & Inclusion - participate in the Academic Center For Equity & Inclusion's Inclusive Teaching Institute; conduct monthly discussion sessions for the Equity & Inclusion Cohort members pursuing the Equity & Inclusion Certificate during the winter and spring of 2022.   | EP<br>Weighting: 15% |
| #5 Objective/Key Responsibility:<br>Custom Training Facilitation - facilitate customized training workshops as requested.   | EP<br>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 Inclusivity:            | 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:             | EP  |
| 9. Planning and Strategic Vision: | PW+ |

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1007151806 | [REDACTED]







ST. JOHN'S  
UNIVERSITY

# Thank You

Please remember to complete the  
evaluations.

**HR Service Representatives:**

Karen Crowley | 718-990-1502 | [crowleyk@stjohns.edu](mailto:crowleyk@stjohns.edu)

Marian Saia | 718-990-2445 | [saiam@stjohns.edu](mailto:saiam@stjohns.edu)