# 2025

# Performance Management Training for Employees

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St. John's UNIVERSITY

# 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.

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## Today's Topics

- Evaluating performance via the RED form
  - Objectives
  - Competencies
  - Professional Development
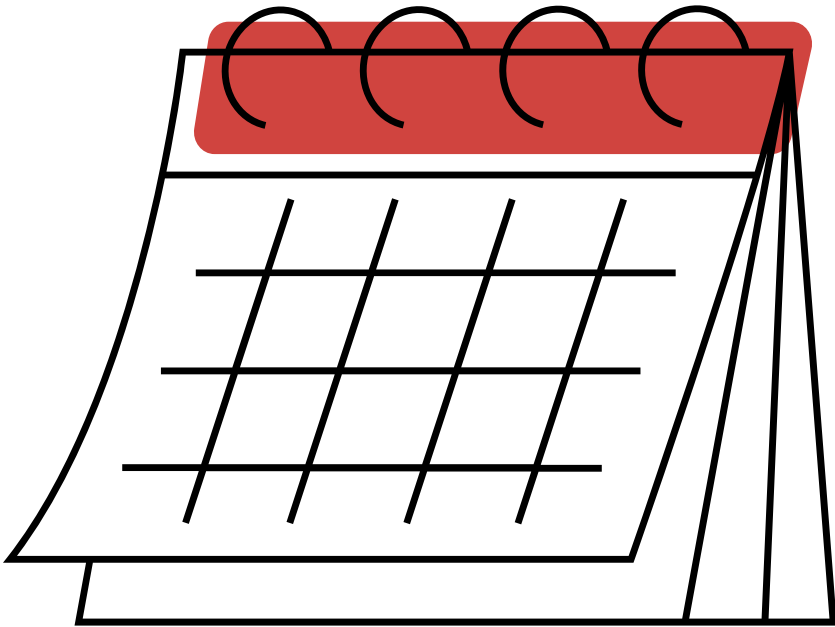- Using Formstack to Complete the RED Form for employees

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# 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 the Performance Cycle throughout the year



Beginning of Performance Cycle

During Performance Cycle

End of Performance Cycle

Final Assessment

# Overview of RED Process in Formstack for 2025



**Step 1**

Employee completes OBJECTIVES with *suggested* WEIGHTINGS and EMPLOYEE SELF-ASSESSMENT

Employee submits and system sends form to manager

By June 27, 2025

**Step 2**

Manager can edit employee's stated OBJECTIVES and WEIGHTINGS; enters RATINGS and MANAGER SELF-ASSESSMENT

Manager submits and system sends draft RED to employee

By July 25

**Step 3**

Manager and employee meet; if OBJECTIVES, WEIGHTINGS, RATINGS, and/or MANAGER SELF-ASSESSMENT should be changed, **manager can edit any or all of those fields**

Manager signs and system sends form to employee

By July 30

**Step 4**

Employee cannot edit any fields but has opportunity to enter rebuttal

Employee signs and system sends final RED to both employee and manager

By August 1, 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.



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# How are Objectives Developed?

STRATEGIC PLAN (Five Foundational Themes)
↓
DEPARTMENT'S GOALS
↓
YOUR MANAGER'S OBJECTIVES
↓
YOUR OBJECTIVES

# 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.

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# Beginning of Performance Cycle: June 2 – July 25

✓ 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**

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

SMART

✅ 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

DUE
JULY
25

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# Objective Weighting - 60% Overall Weights

| Objective | Weighting |
|---|---|
| Objective 1 – Design and Delivery of Training Programs- During the fiscal year , deliver 2-3 workshops for each 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 Adapting to Change 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

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# *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 Manage-ment

Quality of Work

Collegiality & Teamwork

Shared Ownership & accountability

Adapting to Change

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# Beginning of Performance Cycle: June 2 – July 25

**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

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

# 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.

COMMENT

# Five-Point Rating Scale

**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, xxxxxxx, 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 back to your list of accomplishments.

**02.** Complete your Self-Assessment before the meeting. Be objective about the things you did well and the areas where you could have done better.

**03.** Be prepared to discuss your Self-Assessment during the meeting with your manager.

**04.** Discuss areas you would like to develop and/or career interests you may have.

**05.** Be open to feedback and ask questions if you don't understand something.



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# 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.

**02**

**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.

**04**

**05**

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

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# **Additional Resources**

## HR Services Representatives

Karen Crowley
718-990-1502
crowleyk@stjohns.edu

Marian Saia
718-990-2445
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
# June 2, 2025

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



**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.

# Click on the **RED Form** link.

**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.

| Performance Management Training for Employees (Nonsupervisory Administrators and Staff) | Performance Management Training for Supervisors |
| --- | --- |
| <ul><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><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.
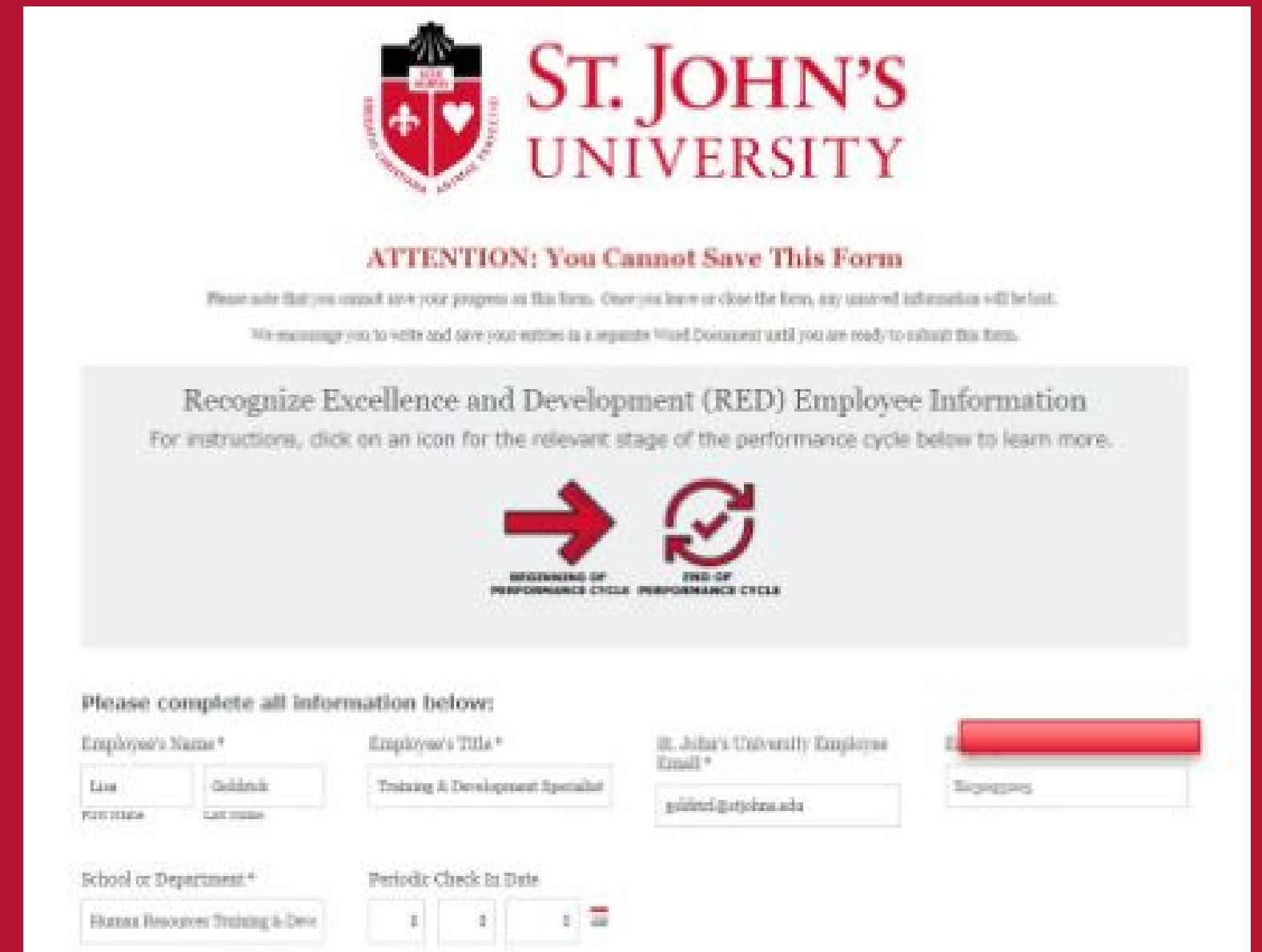
## Click on **Send code**, **enter the code** and click on **Verify**.

# 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.
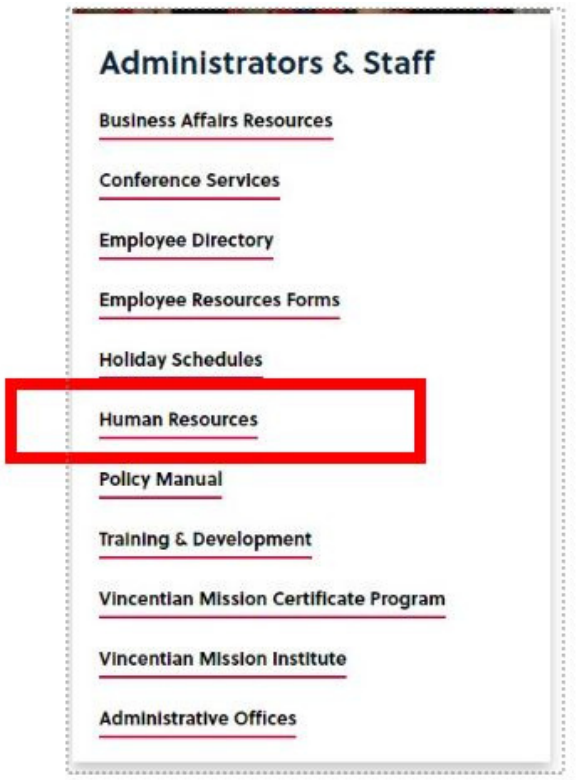
# Accessing the RED Form from the HR Webpage

1. **Login to the <u>St. John's website</u> via stjohns.edu**



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

Administrators & Staff
Business Affairs Resources
Conference Services
Employee Directory
Employee Resources Forms
Holiday Schedules
Human Resources
Policy Manual
Training & Development
Vincentian Mission Certificate Program
Vincentian Mission Institute
Administrative Offices

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

Information For
Current Students
Admitted Students
Faculty, Administrators & Staff
Parent & Family
Employers

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

Payroll and HRIS

Recruitment

Training and Development

Human Resources Services

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# 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*



**For All Employees**

- Access the RED Form (a Formstack document)
- ⬇ RED process for all employees
- Formstack troubleshooting tips from the St. John's IT Service Desk
- Beginning of cycle instructions and setting objectives (⬇ PDF)
- S.M.A.R.T. goals template (⬇ Word)
- Employee Competencies (⬇ PDF)
- Supervisor Competencies (⬇ PDF)
- End of cycle instructions and self-assessment (⬇ PDF)
- Professional development planning (⬇ PDF)

**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.**

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ATTENTION: You Cannot Save 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.

# 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:
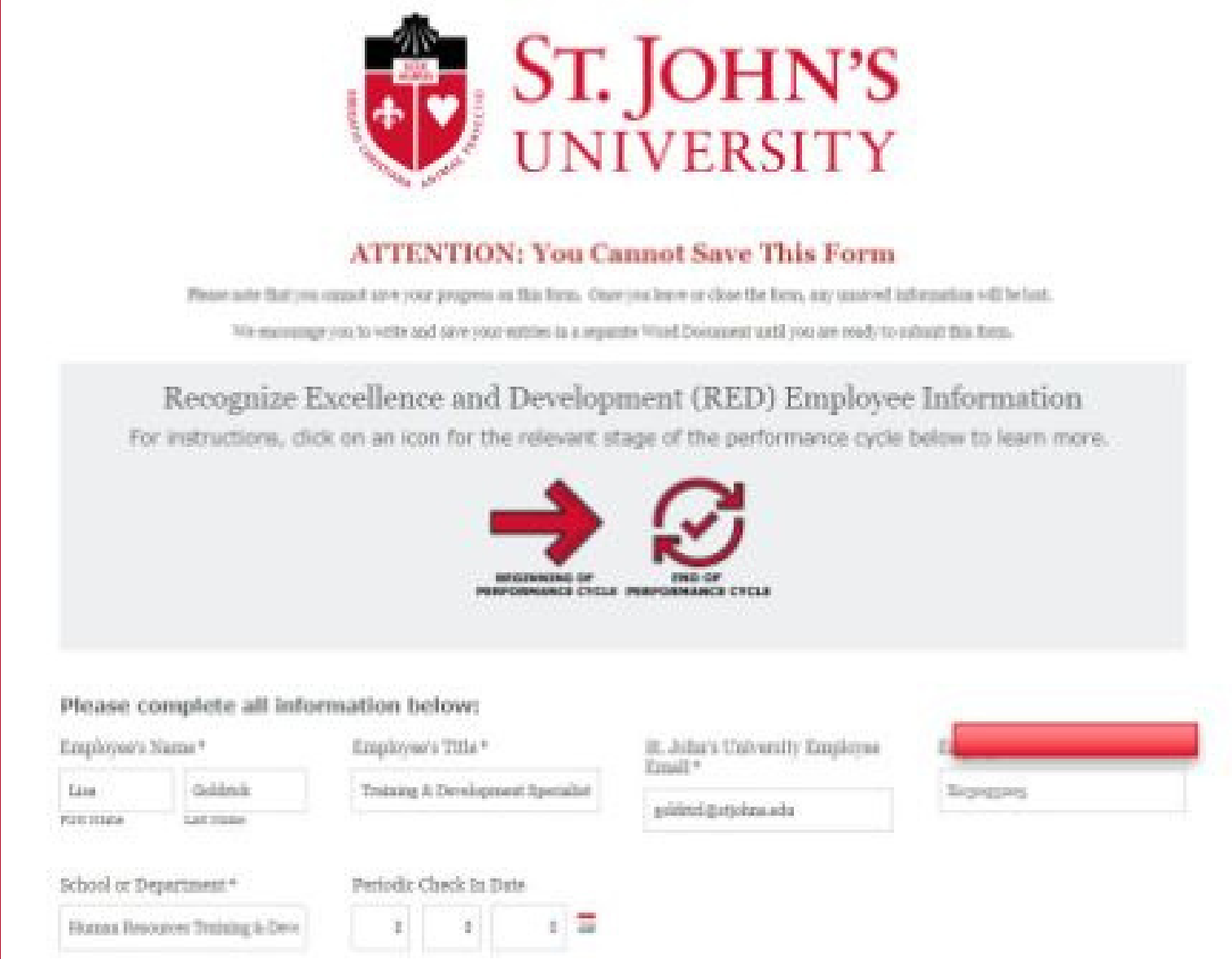
1. Your **First Name, Last Name, Job Title, St. John's Email** address (confirm your email address) and XID number.

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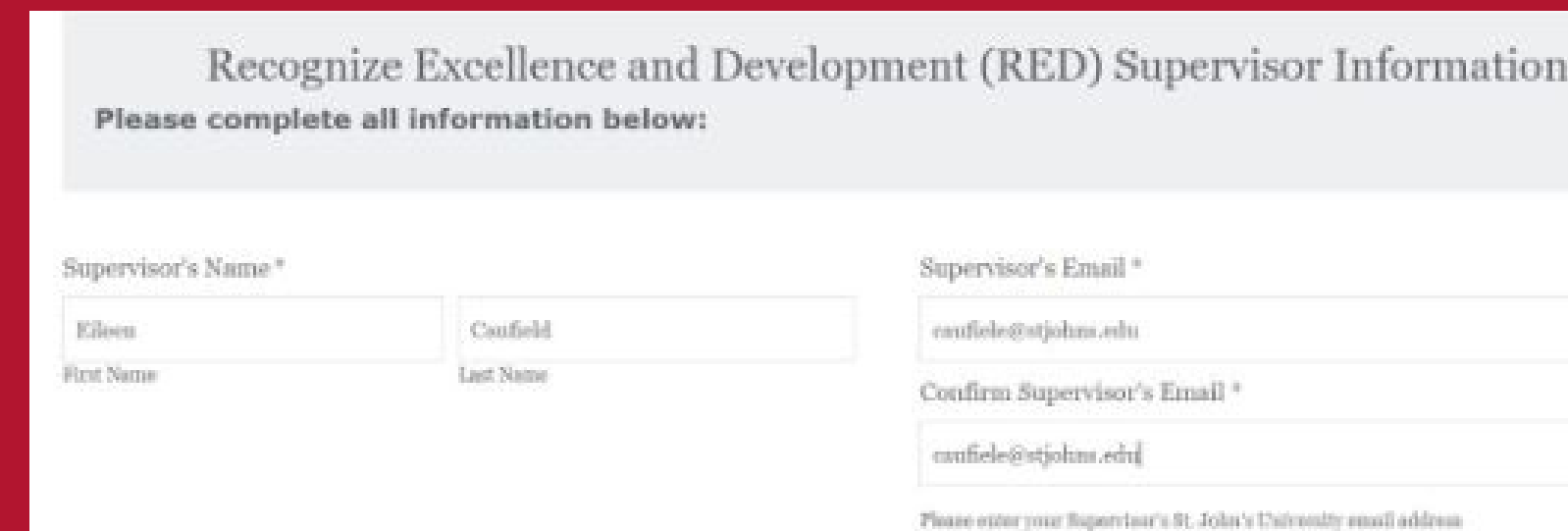
# Completing the RED Form in Formstack – Supervisor's Information

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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 *

Eileen          Caufield

First Name      Last Name

Supervisor's Email *

caufiele@stjohns.edu

Confirm Supervisor's Email *

caufiele@stjohns.edu

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

# 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.
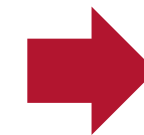
4630/5000

#2 Objective/Key Responsibility Weighting (%) *

15

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

Objective/Key Responsibility *

versity, Equity & Inclusion - Conduct monthly cussion sessions for the Equity & Inclusion ort members pursuing the Equity & Inclusion rtificate during the fall and spring semesters. ntify.  Identify sources for inclusion in an anti-ism 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

stom Training Facilitation - facilitate tomized 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

**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%.**

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# Competency Section of RED

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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
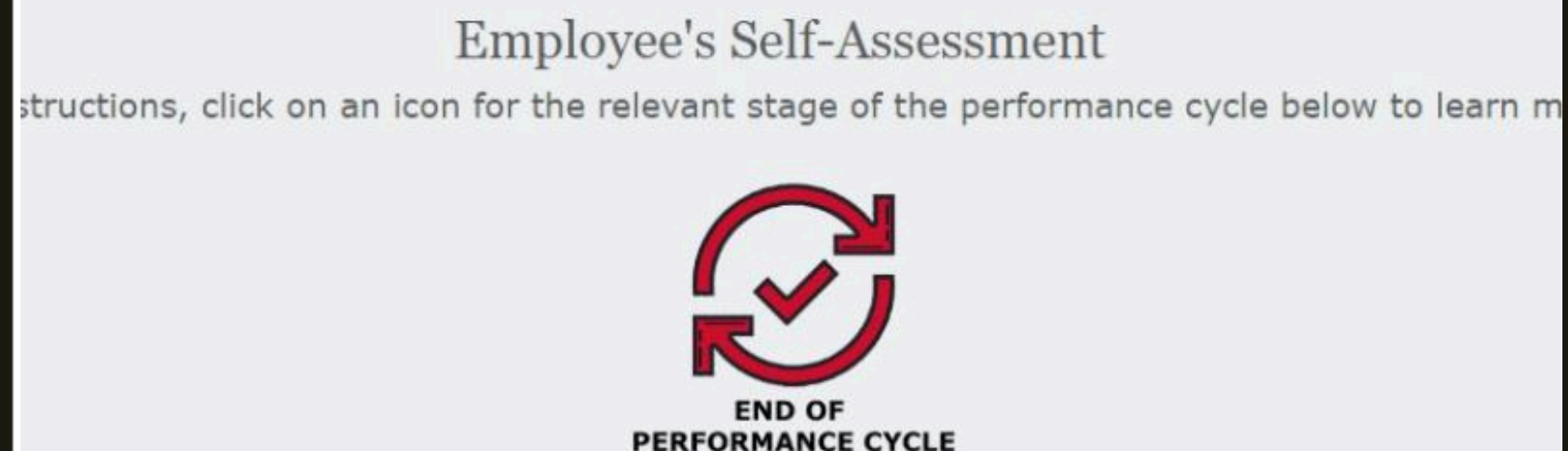Click the icon below for tips on how to complete this section

PROFESSIONAL DEVELOPMENT

| Skills/knowledge/abilities to be developed (or improved) | Action steps/Timeframe | Results/Actions taken |
|---|---|---|
| Complete LinkedIn Learning course on Articulate | By March 30, 2025 | Completed by February 14, 2025 |

| Skills/knowledge/abilities to be developed (or improved) | Action steps/Timeframe | Results/Actions taken |
|---|---|---|
| Learned how to do VLookup in Excel | By December 30, 2024 | Completed by December 9, 2024 |

# 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

...structions, click on an icon for the relevant stage of the performance cycle below to learn m...

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, xxxx completed the training in Canvas, xxx completed the online Information Technology training, and the remaining were trained through a combination of in-person and webinar attendance. Slightly more people attended the programs via the webinar format, supporting the need to continue to offer training via webinar. During the past fiscal year, a new training program, xxxxx, was developed in anticipation of the University roll out of the program. For those programs facilitated by the Associate Director of Training and Development, the 90% very good/excellent rating was maintained.

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

Competencies

Communication – models a direct, open, respectful communication style both in and outside the classroom. Communicates directly with colleagues and clients to achieve the goals of the department. Is willing to ask questions when needed to move the work projects forward, is not afraid to offer an opinion or to speak up when further information is needed. Communicates the priorities of the department to both the T&D assistant and the student workers. Uses email communications effectively to achieve the work of the department.

Quality of Work – looks to submit a quality work product at all times. Is very mindful of the work the department produces and works hard to ensure that all work products are professional, timely and error free.

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

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# 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 from Formstack that the form was submitted successfully.

Submit Form

🔒 Form secured by **Formstack**

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Thank You
The form was submitted successfully.

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 Caufield

Reply | Reply All | Forward
Tue 5/2/2023 4:21 P

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

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 budge to esnure program needs are met; identify a way to convert the section's paper files to a digital format for implementation in FY 2023.

**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, 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 progra 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 th 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.
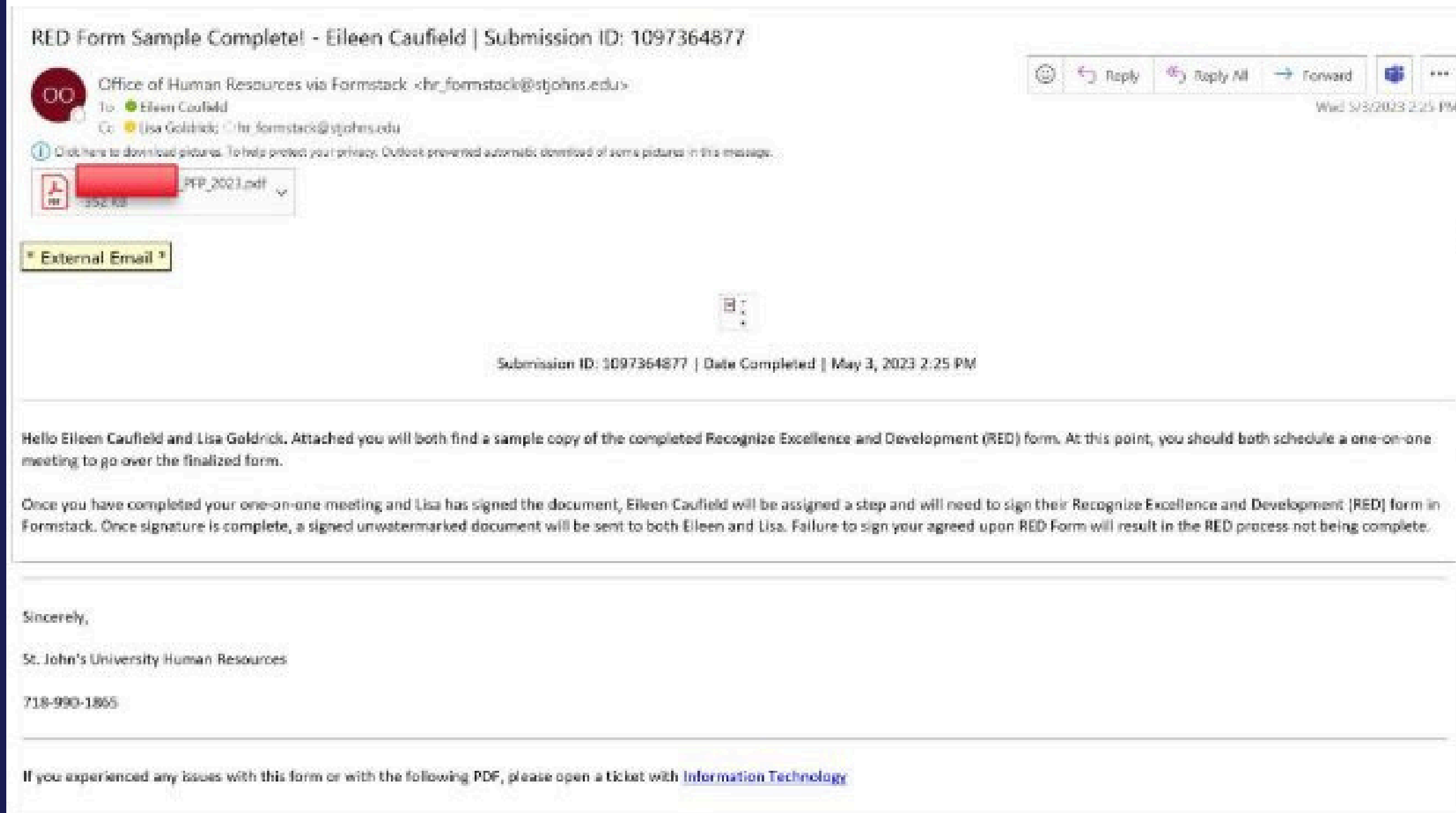
Sincerely,

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.**

RED Form Sample Complete! - Eileen Caufield | Submission ID: 1097364877

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

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

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

PFP_2023.pdf
352 KB

* External Email *

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

Hello Eileen Caufield and Lisa Goldrick. Attached you will both find a sample copy of the completed Recognize Excellence and Development (RED) form. At this point, you should both schedule a one-on-one meeting to go over the finalized form.

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

Sincerely,

St. John's University Human Resources

718-990-1865

If you experienced any issues with this form or with the following PDF, please open a ticket with Information Technology

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# 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:

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

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:** Design and Deliver Training Programs - Continue to deliver to the University Community ongoing training and development workshops in both in-person and webinar formats throughout the year with the goal of achieving an overall evaluation of 90% very good/excellent. | EP Weighting: 50% |
| **#2 Objective/Key Responsibility:** Training Administration - Weekly, download the online Canvas completion results for the mandatory training programs (discrimination, Active Shooter Preparedness, Emergency Readiness, Title IX) and the SANS Cybersecurity training and upload the completions into Banner. Monitor the new hire lists and enroll all new hires into the required training programs bi-monthly. | EP Weighting 15% |
| **#3 Objective/Key Responsibility:** Diversity, Equity & Inclusion - Conduct monthly discussion sessions for the Equity & Inclusion cohort members pursuing the Equity & Inclusion Certificate during the fall and spring semesters. Identify. Identify sources for inclusion in an anti-racism curriculum. | PW+ Weighting 15% |
| **#4 Objective/Key Responsibility:** Strategic Planning and People Management - Manage the training 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 Weighting 10% |
| **#5 Objective/Key Responsibility:** Custom Training Facilitation - facilitate customized training workshops as requested. | PW+ Weighting 10% |
| | 100% |

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

### Competencies – 40% overall weighting

| Competencies | Rating |
|---|---|
| 1. Provide Timely and Excellent Service: | EP |
| 2. Diversity and 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

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# After Review Meeting has been held – Employee Signature Required

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.



# 6 - Employee Signature (Recognize Excellence and Development Workflow v4.2.1) has been assigned to you

noreply@formstack.com
To ● Eileen Caufield
Tue 5/9/2023 8:29 AM

If there are problems with how this message is displayed, click here to view it in a web browser.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Right-click or tap and hold here

# 6 - Employee Signature (Recognize Excellence and Development Workflow v4.2.1) has been assigned to you

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

Hello, thank you for completing your one-on-one meeting with your supervisor and now it is your turn to counter sign your Recognize Excellence and Development (RED) form. If you have not yet had your one-on-one meeting with your supervisor, it is highly recommended that you reach out to them now to schedule a meeting and to not proceed further. If you have had your one-on-one meeting, then please click the link below to login to Formstack and sign your Recognize Excellence and development (RED) form. It is necessary for you to login and countersign your form to complete the process. Once completed, a finalized PDF will be sent to you and your supervisor for your records.
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

# 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**.

# Logging into Formstack to Sign the RED Form

1. **Click on Recognize Excellence and Development Workflow.**
2. **Click on the Workflow # and email address that corresponds to your RED Form.**
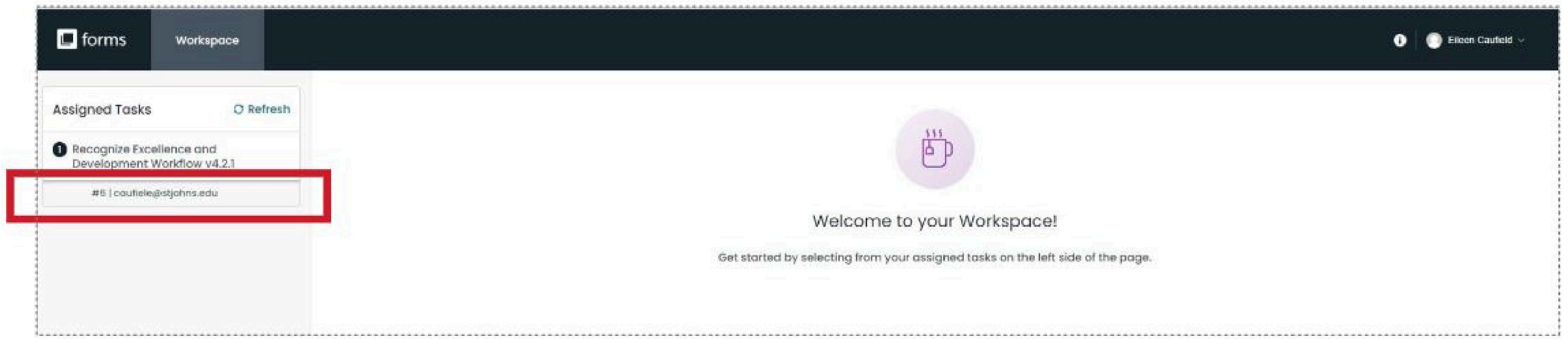
# Logging into Formstack to Sign the RED Form

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**

# 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.**



**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.



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# 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.
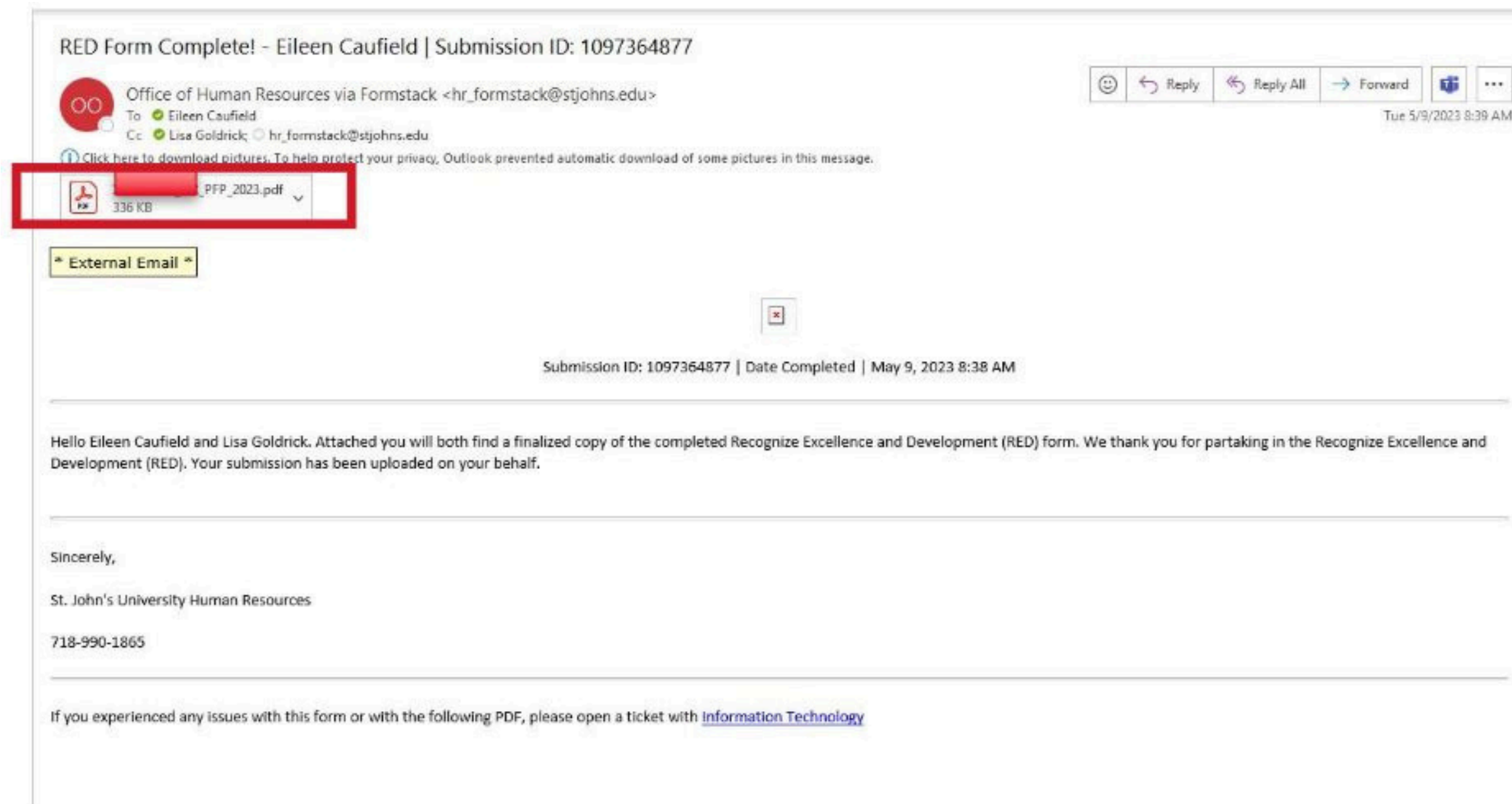
# Logging into Formstack to Sign the RED Form

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.



ST. JOHN'S UNIVERSITY

# Overview of RED Process in Formstack for 2025

# Thank You

Please remember to complete the evaluation form.

**HR Service Representatives:**

Karen Crowley | 718-990-1502 | crowleyk@stjohns.edu
Marian Saia | 718-990-2445 | saiam@stjohns.edu

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