2015 OPE Supervisor Guidelines for Staff Appraisals

The appraisal process will help staff to better understand how their contributions are viewed at USF, and to think creatively about future career goals. The appraisal process is one we view as positive and hopeful; one that should assist everyone in the identification of mutually shared objectives. Yearly appraisals for all OPE members are also required by the collective bargaining agreement between the University and OPE, Local 3. In addition, the appraisal process may be used to help determine individual merit increases.

The concepts listed below were mutually agreed to by both parties to the labor agreement. They are meant to assist supervisors as they prepare for and complete the appraisal process.

**Supervisor**

1. Staff member should **complete the Staff Self-Appraisal on or before March 6, 2015.**

2. Supervisor schedules appraisal appointment with the staff member.
   - **Appraisal meeting will generally be held between March 9 and March 27, 2015.**

3. In preparing for the appraisal, the Supervisor should review staff member’s previous evaluation. The supervisor should also be prepared to discuss the staff member’s current Self-Appraisal.

4. Supervisor meets with staff member for appraisal and reviews the Staff Self-Appraisal.

5. Supervisor ensures that all issues in the Staff Self-Appraisal have been covered and job responsibilities, future goals, etc., are reviewed. Supervisor sets goals and target completion dates, and discusses suggestions for development activities with staff member (e.g., HR professional development, new assignments or projects).

6. The supervisor prepares the written Supervisor Appraisal and gives it to the staff member.
   - **Supervisor will give his/her evaluation to the staff member no later than April 10, 2015.**

7. Staff member will have five (5) days after receiving the supervisor’s Appraisal to review and sign both the Staff Self-Appraisal and the Supervisor Appraisal, attaching any comments to the Supervisor Appraisal if necessary. If needed, the staff member will make a follow-up appointment with their supervisor to discuss comments. The staff member returns both appraisals to the supervisor **no later than April 21, 2015,** keeping a copy for herself/himself.

8. Supervisor insures that the staff member reviews and signs the Supervisor appraisal, attaching any comments to the Supervisor appraisal if necessary.

9. Supervisor should forward copies of both Appraisals and attachments to Human Resources.
   - **Both evaluations should be received by Human Resources no later than April 30, 2015.**
10. Throughout the year, the supervisor and staff member should continue discussions about job responsibilities and how they have changed, periodically checking progress towards performance goals. A mid-year evaluation should be scheduled in the fall.

**Administrative Procedures**

The procedures to distribute the merit increase pool will be consistent with prior years.

1. Vice Presidents and Deans will be assigned a merit increase pool for OPE staff (date to be determined). They will be provided with a list of OPE staff including salary data.

2. Following performance evaluations between supervisors and staff, the supervisor meets with the Vice President/Dean or designee to recommend merit increases. Merit increases should be given to staff whose performance exceeds expectations.
   - Human resources and Labor Relations meet with the Deans or Vice Presidents to review final OPE merit distribution (date to be determined).

3. New hires with less than one (1) year of service (March 1 to March 1) are not eligible for a merit increase.
2015 Supervisor Appraisal Form for OPE Staff

Staff Member’s Name: ______________________  Classification: ______________________

Supervisor’s Name: __________________     Department: __________________

It is recommended that this Supervisor Appraisal form be completed in draft form by the supervisor and reviewed by her/his manager before being discussed and finalized with the OPE staff member.

1. List the staff member’s major accomplishments during the past year. In what specific ways did these support the University’s and department’s goals?

2. List specific examples of the staff member’s strengths and how they relate to the quality and scope of the staff member’s work.

3. Describe any difficulties or problems encountered in the workplace and the actions taken by the staff member to overcome these difficulties or problems.

4. Describe any professional job-related weaknesses and areas needing improvement.

5. List your goals and objectives for this staff member for the next year.

6. Describe the staff member’s overall performance for this period. Give specific examples to support your assessment.

☐ Please see staff member’s attached comments.

Employee: _______________________________  Date: __________

Department Chair: ________________________  Date: __________
(if applicable)  
Supervisor: _______________________________  Date: __________
2015 OPE Staff Self-Appraisal Guidelines and Form

The appraisal process will assist staff to better understand how their contributions are viewed at USF and, as well, to think creatively about future career goals. The appraisal process is one we view as positive and hopeful; one that should assist everyone in the identification of mutually shared objectives. Yearly appraisals for all OPE members are also required by the collective bargaining agreement between the University and OPE, Local 3. In addition, the appraisal process may be used to help determine individual merit increases.

The concepts listed below were mutually agreed to by both parties to the labor agreement. They are meant to assist you as you prepare for and complete the appraisal process.

Staff Member

1. Staff member prepares Self-Appraisal and gives it to the supervisor at least two (2) days prior to the appraisal meeting, keeping a copy for herself/himself. In preparation for the appraisal, the staff member should review their previous evaluation.
   - Staff member should have the Self-Appraisal completed on or before March 6, 2015.
   - Appraisal meeting will generally be held between March 9 and March 27, 2015.

2. Staff member meets with the supervisor for appraisal appointment and reviews the Self-Appraisal with the supervisor. The staff member should ask questions to clarify and ask for specific examples if the supervisor is talking in generalities. The staff member should ensure that all issues in the Staff Self-Appraisal have been covered and job responsibilities, future goals etc., are reviewed. Staff member and supervisor set goals, target completion dates, and discuss suggestions for development activities (e.g., HR professional development, new assignments or projects).

3. Staff member should make notes after the appraisal meetings of any areas of disagreement.

4. Staff member will have five (5) days after receiving the Supervisor’s Appraisal to review and sign both the Staff Self-Appraisal and the Supervisor Appraisal, attaching any comments to the Supervisor Appraisal if necessary. If needed, the staff member will make a follow-up appointment with their supervisor to discuss comments. The staff member returns both appraisals to the supervisor, keeping a copy for herself/himself.
   - Staff member will receive the Supervisor Evaluation no later than April 10, 2015.
   - Staff member will return both evaluations to their supervisor no later than April 21, 2015.

5. Throughout the year, the staff member and the supervisor should continue discussions about job responsibilities and how they have changed, periodically checking progress towards performance goals. A mid-year evaluation should be scheduled.
OPE Staff Self-Appraisal Form

Name: __________________________________________________________

Classification: ___________________________ Dept.: ________________

This questionnaire must be completed by the employee prior to the appraisal meeting. In cases
where the staff member believes a particular question is not applicable, the question should be
discussed with a supervisor prior to the appraisal meeting. Answer the following six questions,
as thoroughly as possible, on separate paper. Please date & all attachments.

1. What were your major accomplishments during the past year; be as specific as possible:

2. List your job-related strengths; please give examples of how you utilize these strengths
during the past year:

3. Identify any difficulties or problems encountered in the workplace and actions you took to
overcome these difficulties or problems:

4. Identify any job-related weaknesses or areas were you believe additional development is
needed:

5. What are your professional goals and objectives for the next year at USF:

6. What resources can be provided which would assist you in meeting future goals/objectives:

Are there any additional comments, observations or suggestions you care to make which would
help your supervisor and the University evaluate your job performance?

Employee: ___________________________ Date: __________________

Supervisor: ___________________________ Date: _________________