

MEMORANDUM

TO: President's Council

FROM: Linda Harber, Vice President, Human Resources, Payroll and Faculty/Staff Life

SUBJECT: 2017 Performance Evaluations

DATE: September 18, 2017

This memorandum is to provide an outline for the 2017 performance evaluation cycle. We are thrilled the recent pay increase was a success. Although we just completed evaluations for some newly hired faculty and staff, the increase was received based on the 2016 evaluation cycle. It is now time to turn our attention to the 2017 performance evaluation cycle! Please reach out to me at 993-2602 if you have any questions or concerns.

Who is being evaluated?

Faculty and staff hired prior to July 25, 2017 will be evaluated for the current 2017 performance year.

Why is performance evaluation important?

Performance feedback is important year round, both positive and developmental. Performance evaluations:

- help to memorialize results for the past year and help to determine goals for the next,
- can add to faculty and staff motivation and engagement by taking time to reflect on successes, and
- can be an opportunity to discuss employee strengths, new approaches, and performance expectations.

How are performance evaluations completed?

Instructional Faculty

Academic Units will receive information from their Dean/Director regarding the evaluation process, procedures and deadlines in accordance with the Faculty Handbook.

Administrative/Professional Faculty and Classified Staff Summary

Type	For the period	Resources available at	Due date	Where
Admin/Prof. Faculty	7/1/16 – 6/30/17	http://hr.gmu.edu/forms	10/24/17	HR & Payroll, MSN 3C3
Classified Staff	10/25/16 - 10/24/17	http://hr.gmu.edu/forms	10/24/17	HR & Payroll, MSN 3C3

Administrative/Professional Faculty

- For the 2017 cycle, please use the form combining the self-appraisal and the supervisor evaluation. All forms can be found on the [HR & Payroll forms page](#).
- We will accept previous versions of the admin/professional faculty evaluation.

Classified Employees

- On the [HR & Payroll forms page](#), you can find rating definitions, evaluation, self-assessment, and "Acknowledgement of Extraordinary Achievement" forms.
- Some key points for supervisors
 - Self-Assessment
 - Please ensure that employees have an opportunity to complete a self-assessment at least two weeks prior to the performance evaluation meeting. Review and consider the self-assessment when completing the performance evaluation.
 - Extraordinary or Unsatisfactory Ratings
 - Prior to giving an extraordinary rating on the performance evaluation, employees should have received at least one "Acknowledgement of Extraordinary Achievement" submission during the performance cycle. Please note that receiving such an acknowledgement does not guarantee an overall rating of "Extraordinary Achievement."
 - **Please contact the Employee Relations team at 993-3878 if you need assistance or are considering an unsatisfactory rating for someone.**

Important Information

***Recognizing Successes**

HR & Payroll encourages supervisors to consider providing employees with more flexibility in how, when, and where they can work through the use of [flexible work options](#).

Please also remember to submit [Outstanding Achievement Award Nominations](#) by September 29th to recognize special faculty and staff achievements.

***Performance Evaluations Going Online in 2018**

Mason has contracted with Cornerstone, an Ellucian partner, to provide a comprehensive performance management module. HR & Payroll has spent the last several months requesting feedback from Administrative and Professional faculty on how they would like this system to function. We will be kicking off the online performance evaluation process with our Administrative and Professional faculty later this year by asking them to begin inputting their goals for the upcoming year (2017-18). Evaluations will be completed through the online tool beginning with the 2018 evaluation cycle. For more information, please contact Michelle Lim at mlim1@gmu.edu.

***Managing Risks & Hazards**

Environmental Health & Safety has requested that managing risk and hazards be included as part of the performance appraisal process.

- Employee Work Profiles (EWP) should include whether the position is designated and/or serves as a safety liaison.
- Administrative/Professional faculty position descriptions and Classified staff EWPs should include a statement that "identifying and managing work related risks" is part of the Confidentiality and Compliance section.

***Span of Control**

The number of benefitted direct reports a supervisor or manager has is referred to as his or her "span of control." The Joint Legislative Audit & Review Commission (JLARC) requires each Virginia public four-year higher education institution to develop standards that establish and promote broader spans of control for supervisors with six or fewer direct reports. **This information must be presented to the Board of Visitors annually.** For now please:

- Continue to work with Workforce Planning as we verify supervisors.
- If reporting relationships change (e.g., due to reorganization) please have your HR Liaison complete a [Timesheet Approver/Supervisor Change Form](#) and send to HR.
- Note: Mason has hired a consultant to review and recommend standards and protocols for our spans of control per JLARC requirements.
- **Due to the JLARC requirement, please update the following documents:**
 - org charts
 - position descriptions
 - employee work profiles
 - flexible work agreements
 - supervisory assignments
- send updates to: **HR & Payroll, MSN 3C3**

Training and Questions

- Human Resources and Payroll will be offering workshops for supervisors on conducting the appraisals, including the new components of purchasing and the Mason Values. Please visit <http://hr.gmu.edu/learning/> for more information and to register.

- Individual consultations on how to maximize the performance evaluation process can also be scheduled by contacting the Employee Relations team at 3-3878.
- Frequently asked questions will be posted on the Human Resource website at <http://hr.gmu.edu>. If you have additional questions, please email workplan@gmu.edu or call 3-2600.
- Accrediting standards set by the Southern Association of Colleges and Schools' Commission on Colleges (SACS-COC) requires that universities regularly conduct evaluations of both faculty and staff. Questions may be directed to Claudia Rector, Assistant Provost for Academic Affairs, at crector@gmu.edu .