

Quick Reference:

Staff Performance Management – Completing the Evaluation Stage

NOTE: This quick reference is for use with the **NEW 2018 – 2019 Staff Performance Management Planning and Evaluation Form**.

General Information

The performance evaluation is an annual requirement for university staff that occurs toward the end of the performance period. Your HR Service Team is available to assist you in completing the evaluation stage. Performance evaluations must be completed by the employee's immediate supervisor (the rating officer). Performance evaluations may be completed up to 90 days prior to the end of the performance period. During this evaluation, the supervisor and the employee formally review the employee's performance for the year. The Office of Human Resources expects communication and feedback to have been given throughout the performance period; therefore, both the employee and their supervisor should already know how the employee's actual performance compares to the expectations set in the planning stage.

Step I: Skip the first page and complete the sections that have **orange** instructional boxes. The sections marked with  in the example to the right should have been completed earlier in the performance period during the planning stage.

Note: The size of the paragraph text box expands once all text is entered. Hover over each field for clarification on how to complete a specific action.

Step II: Once the evaluation stage form is complete, return to the section in **purple** and complete the requested fields.

The Office of Human Resources **highly encourages** supervisors to follow the performance management process with all time-limited (TLP) and temporary grant (TGP) employees as well.

Evaluation Stage Acknowledgement Section

Return to this portion and complete the requested fields **once you have entered the evaluation stage information on the rest of the form**.

Note: The "Rating Officer" is the employee's direct supervisor; the "Reviewing Officer" is the direct supervisor's supervisor.

The evaluation should occur at the end of the performance review period. This conversation between the supervisor and the employee should reflect on the year. It is important that the supervisor reviews the evaluation with the employee to ensure clear communication regarding performance for the review year. Your HR Service Team is available to assist you in completing an evaluation.

The rating officer and the reviewing officer should agree on the evaluation and sign the acknowledgement before the employee provides a final review of the evaluation and signs the acknowledgement.

CLEMSON UNIVERSITY

HR USE ONLY
DO NOT WRITE IN THIS SECTION
Rating: _____
Review Date: _____
CUBS Entry Date: _____

Staff Performance Management Planning and Evaluation Form

For assistance with this form or its contents, visit the Staff Performance Management Program section of [this page](#).

Employee's Legal Name _____
Position Title _____ Employee ID _____
Department Name _____ Department _____
Date Assigned to Current Position _____
Performance Review Period from _____ to _____

PLANNING STAGE ACKNOWLEDGEMENT SIGNATURES

Rating Officer _____ Date _____
The position description not reviewed.
Reviewing Officer (optional) _____ Date _____
Employee _____
Signature of the employee indicates the planning stage information and position description were reviewed with the employee.

EVALUATION STAGE ACKNOWLEDGEMENT SIGNATURES

Rating Officer _____ Date _____
Reviewing Officer _____ Date _____
Reviewing Officer's Comments _____
Employee _____ Date _____
My signature indicates that I was given the opportunity to discuss this official performance review with my supervisor, not that I necessarily agree.
Employee's Comments _____

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Job Functions Section

In the planning stage, supervisors and employees work together to provide information on job functions and success criteria for the year. **During the evaluation stage**, supervisors provide a review of the employee's actual performance during the period of review. The state of SC requires an annual performance review for covered staff members.

Job Duties: Performance Level

For each job duty listed, **select a performance level** from the drop-down box in the upper right corner. Base this selection on the employee's actual performance as it relates directly to the job duty and success criteria defined in the planning stage. The definitions for each rating can be found [here](#).

Job Duties: Actual Performance

For each job duty listed, **describe the employee's actual performance** as it relates directly to the job duty and success criteria defined in the planning stage. Success criteria defined in the planning stage should have included S.M.A.R.T. goals:
S=Specific **M**=Measurable **A**=Attainable **R**=Relevant **T**=Time-Bound

Important: Prior to completing this portion of the evaluation, the supervisor should discuss the employee's actual performance with them in order to gain clear insight on their level of achievement of the success criteria. It is highly encouraged that the supervisor also ask for input from those with whom the employee worked in the job duty and objective areas.

JOB FUNCTIONS

The job duties listed in this section should correspond with the employee's position description and relate to what the employee is expected to perform. Through discussion, the supervisor and employee should select at least three job duties that will be a focus for the upcoming performance year. **NOTE:** Job duties listed below focus on the employee's day-to-day activities that support the department's annual objectives. All related job duties listed on an employee's position description must be fulfilled regardless of whether those same job duties are included below.

During the evaluation stage, select the performance level from the drop down box provided that you believe most accurately reflects the employee's performance during the evaluation period. For explanation regarding performance levels, click [here](#).

JOB DUTY 1 Performance Level

Job duty and success criteria (to be completed during planning stage)  **Should be completed during planning stage.**

Actual performance (to be completed during evaluation stage)

JOB DUTY 2 Performance Level

Job duty and success criteria (to be completed during planning stage)  **Should be completed during planning stage.**

Actual performance (to be completed during evaluation stage)

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JOB DUTY 3 Performance Level

Job duty and success criteria
(to be completed during planning stage)

Actual performance
(to be completed during evaluation stage)

ADDITIONAL JOB DUTY Performance Level

Job duty and success criteria
(to be completed during planning stage)

Actual performance
(to be completed during evaluation stage)

***Please note:** You may add additional job duties for planning and evaluation by clicking the "Add Job Duty" button below.

Add Job Duty Remove Job Duty

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Evaluation of Added Job Duties

If you added additional job duties during the planning stage, select a performance level for each job duty and describe the employee's actual performance as it relates to each additional job duty and its success criteria.

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Competencies Section

Effective 2015, all position descriptions for classified and unclassified FTE positions include specific competencies chosen from a list of nine competencies provided by the Office of Human Resources. Competencies define the behaviors or characteristics critical to the employee's ability to perform the job.

This section of the form emphasizes behaviors important to successful performance of the job functions and objectives detailed in the planning stage.

All supervisors are to be rated on the competency "Supervision and Management."

Competencies – Part I

For each competency listed, **select a performance level** from the drop-down box in the upper right corner. Base this selection on the employee's actual performance as it relates to the competency defined in the planning stage.

Competencies – Part II

For each competency listed, **comment on the employee's performance** as it relates directly to the competency and its definition from the planning stage.

Evaluation of Additional Competency

If you added an additional competency during the planning stage, select a performance level and comment on the employee's actual performance for the additional competency.

COMPETENCIES

As part of the performance evaluation process, employees must be rated on competencies. This section should emphasize those characteristics that are important to success in performing the job functions and objectives included in the planning stage. Evaluation on one to three competencies is recommended. All supervisors are to be rated on the competency of "Supervision and Management." The competency for planning and evaluation will be selected from the drop-down box provided. To review all competencies and their definitions, click [here](#).

COMPETENCY 1

Should be completed during planning stage.

Performance Level

Performance/Comments
(to be completed during evaluation stage)

COMPETENCY 2

Should be completed during planning stage.

Performance Level

Performance/Comments
(to be completed during evaluation stage)

ADDITIONAL COMPETENCY (Optional)

Should be completed during planning stage.

Performance Level

Performance/Comments
(to be completed during evaluation stage)

***Please note:** You may add competencies for planning and evaluation by clicking the "Add Competency" button below.

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ClemsonForward Section

During the planning stage, you reviewed the university's mission and the ClemsonForward strategic plan summary. During the evaluation stage, you will assess the employee's performance as it relates to one or more strategic priorities in support of ClemsonForward.

CLEMSON FORWARD

Clemson University was established to fulfill our founder's vision of "a high seminary of learning" to develop "the material resources of the State" for the people of South Carolina. Nurtured by an abiding land-grant commitment, Clemson's primary purpose is educating undergraduate and graduate students to think deeply about and engage in the social, scientific, economic and professional challenges of our times. The foundation of this mission is the generation, preservation, communication and application of knowledge. The University also is committed to the personal growth of the individual and promotes an environment of good decision making, healthy and ethical lifestyles, and tolerance and respect for others. To accomplish this goal, the University's leadership has developed four strategic priorities for Clemson to become nationally recognized as a leader in the four key areas listed below.

RESEARCH

Clemson will be nationally recognized as a leader in research, consistently ranked among institutions with the highest level of research activity.

- Refocus research mission and increase nationally competitive scholarship and funding in six innovation clusters
- Grow targeted research investments
- Raise research expectations and reward research excellence

ENGAGEMENT

Clemson will continue to be recognized as a leader in engagement, encompassing student engagement, community outreach and public-private partnerships.

- Build a campus-wide global engagement infrastructure: Increase opportunities for students to interact across cultures and national boundaries
- Foster evidence-based academic engagement
- Enhance engagement opportunities across academic affairs and student affairs
- Leverage innovation campuses and research centers to support community engagement and economic development in South Carolina

ACADEMIC CORE

Clemson will protect and strengthen the academic core, ensuring that it remains perennially ranked among the nation's top public universities.

- Re-envision general education
- Build interdisciplinary capacity to meet the needs of the future
- Increase the number of high-quality, nationally prominent graduate programs - This includes competitive financial packages and enhancements to the graduate student living and learning environment
- Professionalize academic advising and curriculum resources, and enhance early-warning systems to identify any student whose retention and graduation is in jeopardy; facilitate academic program choices and career preparation

LIVING

Clemson will enhance the living environment to make the University an outstanding place to live, learn and work while also increasing diversity and a climate of inclusive excellence.

- Increase diversity in the student body, as well as among faculty and staff; recruit and retain top talent from all racial groups and socioeconomic backgrounds, with specific focus on underrepresented minorities
- Nurture a climate of diversity, inclusion, and respect
- Lead the nation in rewarding top performance and advancing workplace quality of life

Administrative and support units may also find ways to align with *ClemsonForward* through their responsibilities for one of four **key enablers**:

- **College Reorganization** - Enhance the academic learning and working environment
- **Strategic Revenue Growth** - Manage enrollment, legislative and development priorities while enhancing entrepreneurial activities, operational efficiencies and revenue allocation to support *ClemsonForward* priorities
- **Building Futures** - Build new state-of-the art facilities, renovate aging structures and create multi-function spaces that provide a vibrant academic, research, student life and work environment
- **Accountability and Leadership** - Prudently manage resources, focus on impact rather than activity, clearly identify ownership of key initiatives and provide transparency through regular reporting to University leaders, Board of Trustees and the campus community

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Employee Objectives in Support of ClemsonForward Section

During the planning stage, you identified strategic priorities that directly relate to the employee's job and support ClemsonForward initiatives.

During the evaluation stage, the supervisor (the rater) provides a review of the employee's actual performance as it relates to the identified strategic priorities.

Strategic Priority: Performance Level

Select a performance level from the drop-down box in the upper right corner. Base this selection on the employee's actual performance as it relates directly to the strategic priority and its success criteria defined in the planning stage.

Strategic Priority: Actual Performance

Describe the employee's actual performance as it relates to the strategic priority and its success criteria defined in the planning stage. Provide evaluation based on S.M.A.R.T. goals: **S**=Specific **M**=Measurable **A**=Attainable **R**=Relevant **T**=Time-Bound

Evaluation of Additional Strategic Priority

If you added an additional strategic priority in the planning stage, select a performance level and describe the employee's actual performance as it relates to the additional strategic priority and its success criteria.

EMPLOYEE OBJECTIVES IN SUPPORT OF CLEMSON FORWARD
The success of Clemson University is directly connected to the support and participation of its employees. Each employee is to be rated on at least one ClemsonForward strategic goal. Departments are not expected to contribute to every goal. Be realistic about where your goals "fit," using the definitions as a guide. (See previous page.) Administrative and support units may find ways to align with ClemsonForward through their responsibilities for one of four key enablers. Success criteria are required for each objective. The strategic priority for planning and evaluation will be selected from the drop-down box provided.

STRATEGIC PRIORITY 1

Should be completed during planning stage.

Performance Level

Objective and success criteria (to be completed during planning stage)

Actual performance (to be completed during evaluation stage)

Should be completed during planning stage.

ADDITIONAL STRATEGIC PRIORITY (Optional)

Should be completed during planning stage.

Performance Level

Objective and success criteria (to be completed during planning stage)

Actual performance (to be completed during evaluation stage)

***Please note:** You may add strategic priorities for planning and evaluation by clicking the "Add Strategic Priority" button below.

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Additional Objectives Section

This **optional** section is for additional objectives set by the supervisor and the employee. Additional objectives can relate to performance improvement, professional development, support of ClemsonForward or support of a departmental objective.

Additional Objective: Performance Level

Select a **performance level** from the drop-down box in the upper right corner. Base this selection on the employee's actual performance as it relates to the additional objective and its success criteria defined in the planning stage.

Additional Objective: Actual Performance

Describe the employee's actual performance as it relates to the additional objective and its success criteria defined in the planning stage. Provide your evaluation using S.M.A.R.T. goals:
S=Specific **M**=Measurable **A**=Attainable **R**=Relevant **T**=Time-Bound

Enter Summary and Comments

During the evaluation stage, the supervisor and the employee work together to review and summarize the employee's major accomplishments, areas needing improvement, and next steps to improve performance. This is an opportunity to provide an overview of the employee's performance as it relates to all elements of the evaluation form for the year in review and to focus the employee on improvement areas for the next review year.

Overall Evaluation Results Section

Select an **overall evaluation result**. Select the result that best indicates the employee's overall performance throughout the review year based on the expectations defined in the planning stage. Definitions of each evaluation result can be found [here](#).

Now that you have completed this section, return to the first page of the form to complete the **Evaluation Stage Acknowledgement** Section.

The screenshot shows the 'ADDITIONAL OBJECTIVE' section of the form. It includes a title, a descriptive paragraph, a 'Performance Level' dropdown menu, and two text input fields for 'Additional objective and success criteria (to be completed during planning stage)' and 'Actual performance (to be completed during evaluation stage)'. Below these are 'Add Objective' and 'Remove Objective' buttons. A red prohibition sign is placed over the 'Performance Level' dropdown. A callout box points to it with the text: 'Should be completed during planning stage if an additional objective was added.' Below the objective section is the 'SUPERVISOR'S SUMMARY AND COMMENTS' section, which is a large empty text box. At the bottom of the form is the 'OVERALL EVALUATION RESULTS' section, which contains six radio button options: Top Performance, Exceptional Performance, Successful Performance, Developing Performance, Improvement Needed, and Unsuccessful Performance. The page number 'Page 7 of 7' is visible at the bottom.