



## HUMAN RESOURCES DESKTOP PROCEDURES

### SECTION TITLE

PERFORMANCE REVIEWS FOR ADMINISTRATIVE, PROFESSIONAL, AND CAREER EMPLOYEES

NUMBER

2019-05

PAGE

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### APPROVED BY:

Chief Human Resource Officer

### DATE REVISED

December 01, 2023

## PURPOSE

To codify procedures for completing a performance review for Administrative, Professional, and Career (full-time and regular part-time) in accordance with [APM 03-1201](#).

## BACKGROUND

Effective with the 2018-19 review period and the 2019-20 academic year, performance reviews are conducted using an electronic evaluation tool on a NeoEd platform. The performance review process is branded as myIMPACT (Individually Measuring Performance and Achievement to Cultivate Talent). myIMPACT emphasizes employee engagement and fosters more frequent, relevant and timely feedback communication between supervisors and employees. The process incorporates competency-based performance measurement, SMART goal setting and tracking, and individual professional development planning.

## PROCEDURES

Performance reviews will be generated for all Administrative, Professional, full-time and regular part-time Career employees. The chain of command for reviews is as defined in myFSCJ.

### Review Cycles

**Administrative** – Administrative employees are reviewed annually on June 15 and the employee should be in place six (6) months before a review is completed. If an Administrative employee is hired between December 16 and June 15 and has been at the College for less than 6 months, the supervisor can mark all competencies as “Employee is new to the College within the last 6 months.” The supervisor must create at least one (1) Future SMART Goal, to be rated on the employee’s next scheduled review. If an Administrative employee is hired between June 16 and December 15, the supervisor will enter the employee’s initial SMART Goal(s) on the “First SMART Goal(s) Entry” form. This is a separate task from the regularly scheduled review cycle and will open upon the employee’s start date.

If an Administrative employee separates from the College before June 15, a review is not required. A supervisor should contact Human Resources (“HR”) to have this cancellation completed.

**Professional/Career** – Professional/Career employees are reviewed twice per year (June 15 and December 15) and the employee should be in place for four (4) months before a review is completed. If a Professional or Career employee has been with the College for less than four (4) months, the supervisor can mark all competencies as “Employee is new to the College within the last 4 months.” The supervisor must create at least one (1) Future SMART Goal, to be rated on the employee’s next scheduled review.

If a Professional/Career employee separates from the College before June 15 or December 15, the applicable review is not required. A supervisor should contact HR to have this cancellation completed.



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Per [APM 03-1102](#), newly hired full-time and regular part-time Career employees shall be in a probationary period for not less than one (1) year. At least one regularly scheduled review must be completed prior to the end of the twelve (12) month probationary period.

**NOTE:** If an employee receives a "Meets Some Expectations" or "Does Not Meet Expectations" for any competency, it is important to include a comment explaining the rating.

**Review/Overdue Notifications and Reminders**

Notifications and reminders are sent out to supervisors and employees whenever a task becomes available or is overdue.

**Initial SMART Goal(s) Entry Form (for Administrative employees hired between June 16 – December 15 only)**

Action	Recipient	Notification Sent
Form created/available notification	Supervisor	Fourteen (14) days before form due date
Form due reminder	Supervisor	Form due date
Overdue reminder	Supervisor	Every week form is overdue
Employee Signature notification	Employee	When Goal(s) are submitted
Overdue Employee Signature reminder	Employee	Every three (3) days the Employee Signature is overdue
Form complete notification	Supervisor	When form is complete

**Administrative Reviews**

Action	Recipient	Notification Sent
Review created/ Check-In available notification	Supervisor	150 days before review due date
Check-In reminder	Supervisor	Two (2) weeks before Check-In is due
Ratings available notification	Supervisor	Forty-five (45) days before review due date
Ratings reminder	Supervisor	One (1) week before Ratings is due
Overdue Ratings reminder	Supervisor	Every week Ratings are overdue
Approval Signature notification	Supervisor's Supervisor	If supervisor rates any competency as "Does Not Meets"
Overdue Approval Signature reminder	Supervisor's Supervisor	Every two (2) days the Approval Signature is overdue
Schedule and Conduct In-Person review notification	Supervisor	When Ratings are complete
Overdue In-Person review reminder	Supervisor	Every three (3) days the In-Person review is overdue



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Approval Signature notification	Supervisor	When In-Person review is complete
Overdue Supervisor Approval signature reminder	Supervisor	Every three (3) days the Approval Signature is overdue
Employee Signature notification	Employee	When Supervisor's Approval Signature is complete
Overdue Employee Signature reminder	Employee	Every three (3) days the Employee Signature is overdue
Review complete notification	Supervisor	When review is complete

**Professional/Career Reviews**

Action	Recipient	Notification Sent
Review created/ Check-In available notification	Supervisor	Ninety (90) days before review due date
Check-In reminder	Supervisor	Two (2) weeks before Check-In is due
Ratings available notification	Supervisor	Forty-five (45) days before review due date
Ratings reminder	Supervisor	One (1) week before Ratings is due
Overdue Ratings reminder	Supervisor	Every week Ratings are overdue
Approval Signature notification	Supervisor's Supervisor	If supervisor rates any competency as "Does Not Meets"
Overdue Approval Signature reminder	Supervisor's Supervisor	Every two (2) days the Approval Signature is overdue
Schedule and Conduct In-Person review notification	Supervisor	When Ratings are complete
Overdue In-Person review reminder	Supervisor	Every three (3) days the In-Person review is overdue
Approval Signature notification	Supervisor	When In-Person review is complete
Overdue Supervisor Approval signature reminder	Supervisor	Every three (3) days the Approval Signature is overdue
Employee Signature notification	Employee	When Supervisor's Approval Signature is complete
Overdue Employee Signature reminder	Employee	Every three (3) days the Employee Signature is overdue
Review complete notification	Supervisor	When review is complete

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### **Overdue Reviews**

All employee reviews should be completed by their designated due date. For reviews not completed by the designated due date, the following communications are sent:

After fourteen (14) days, supervisors who have not completed a review are sent an email from Employee Relations (“ER”) stating that they have one or more overdue tasks and asking that they take immediate action.

After thirty (30) days, a final email is delivered to both the supervisor and the supervisor’s supervisor stating that the review has not been completed and asking that they take immediate action.

After forty-five (45) days, if a review is not completed ER sends an email to the Vice President of the business area with the name of the supervisor who has not completed the review. The email requests the Vice President’s assistance in resolving the issue immediately.

At sixty (60) days, ER provides the name of any supervisor having not completed the review to the Chief Human Resource Officer for further action and resolution.

### **Check-Ins**

Check-ins are a series of questions designed to facilitate conversation between the supervisor and employee. The conversation is not limited to these questions. The check-in is a meeting between the supervisor and employee regarding support the employee may need, progress on SMART goals, individual development plans, upcoming projects and any other topics that the employee/supervisor may want to discuss. Check-ins for Administrative employees should occur in January. Professional/Career employees should complete semiannual check-ins in March and September.

### **Journal Entries**

Employees and supervisors can track goal progression and performance using the Journal Entry feature. Tracking goal progression and performance provides documentation that assists when preparing the review. Journal entries can be shared by the employee with their supervisor and/or second level supervisor.

### **Issues/Concerns**

1. If an employee refuses to sign their review, the employee should be counseled that signing in the signature box does not indicate agreement but only that they received the review. The employee may provide a written rebuttal to HR that will be attached to the review. As the final step, the supervisor would notify the appropriate VP that the employee refuses to sign the review.
2. If a supervisor begins a review but does not complete it before an employee changes to a new supervisor, the supervisor who began the review should complete the review. If the supervisor did not begin the rating step on the review, the review form will automatically be

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transferred to the new supervisor. In this case, the previous supervisor can be added as an additional rater on the review.

3. If a supervisor completes a review but the employee is no longer with the College, the supervisor should notify HR who can move the review forward. Where the separated employee would sign, the HR administrator shall “skip” the step and enter in the comment box, “Employee is no longer with the College. Employee is unavailable to sign.” This will complete the review process.
4. A supervisor may ask to go back and change information on the review after submitted. If the employee has not signed the review, an HR administrator may unlock a step to allow a supervisor to revise or update a section. The date and reason for the revision should be noted by the HR administrator in the comment section. HR will save a copy of the review, before any changes are made, for documentation purposes. If the employee has signed the review, the information may not be changed by the supervisor.

### **SMART Goals**

Goal setting is a collaborative process between supervisor and employee to move the organization forward as evidenced by tangible results. Goals should align with departmental and/or organizational priorities, and should be written using the SMART Goal model (Specific, Measurable, Achievable, Relevant/Realistic, and Time-bound). Supervisors can set unique goals for each employee or they can set the same goal for multiple employees in a given department if those employees are in the same role or perform similar duties.

**Who** – All Administrative, Professional, and Career employees.

**How many** – Employees should have at least one active goal entered in the system at any given time.

**Duration** – Goal duration can vary (e.g. 6-month goal, 2-year goal, etc.). Goals are not bound to the fiscal year.

**Timelines** – Supervisors of Professional and Career employees will enter Future Goal(s) on the regularly scheduled semi-annual performance review and employees will be able to acknowledge their Future Goal(s) when they sign the review. Supervisors of Administrative employees hired between June 16 and December 15 will enter the employee’s Future Goal(s) on the First SMART Goal(s) Entry form, within the first two (2) weeks of the employee’s start date. After the supervisor submits the goal(s), the employee will receive a task to acknowledge/sign their Future Goal(s). Supervisors of Administrative employees hired between December 16 and June 15 will enter the employee’s Future Goal(s) on the regularly scheduled annual performance review and employees will be able to acknowledge their Future Goal(s) when they sign the review.

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**Goal Rating** – Supervisors will rate an employee’s Current Goal(s) on the regularly scheduled performance review.

**NOTE:** When an employee transfers to a new area/role, the supervisor should meet with the employee to review and edit the employee’s goal(s) in the system based on the employee’s new role. A supervisor should contact HR to assist in completing this edit.

**Individual Development Plan (IDP)**

The purpose of the IDP is to select developmental objectives and activities to assist employees in their career and personal development. The IDP helps employees reach short and long-term developmental objectives, as well as improve current job performance. Administrative, Professional and Career employees will have discussions with their supervisor about their Individual Development Plans during the scheduled Check-ins. During the Check-in, the supervisors and employees will collaboratively select developmental objectives and activities that would best support the employee’s professional growth.

**Training**

All employees are strongly encouraged to take PD 4071 – Introduction to myIMPACT.

Additional trainings that can assist supervisors and employees with the myIMPACT process include:

- PD 4072 myIMPACT: Performance Reviews (for supervisors)
- PD 4073 myIMPACT: SMART Goals
- PD 4074 Coaching for IMPACT (for supervisors)

[myIMPACT instructional materials/videos](#) are available on the Training & Organizational Development website.

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