Performance Appraisal for Staff Personnel

Summary/purpose: The purpose of the probationary staff appraisal and annual staff performance appraisal is for a supervisor and a staff member (non-faculty personnel) to have a candid discussion about performance expectations and actual performance. The employee's actual level of performance is compared to the expected level of job performance and behavioral factors. The comparison of actual performance with expectations and standards serves as a basis for recognizing accomplishments and planning for improvement where deficiencies are found.

The benefits to be gained from conducting performance appraisals include:

A. Formally recognizing accomplishments
B. Identifying newly acquired competencies
C. Preparing performance development plans and goal setting
D. Planning improvement where deficiencies are found
E. Open and continued communication between the supervisor and employees

All regular staff members, including executive staff, are entitled to performance appraisal feedback on a regular basis. The staff member and the immediate supervisor should annually participate in a formal performance appraisal discussion. Each annual performance appraisal will be reviewed and acknowledged by the staff member and the appraisal will be included as part of the staff member’s personnel record. The staff member will have access to the appraisal form online while employed with the University. Supervisors are encouraged to hold mid-year informal performance review discussions at least once a year as well. As part of these reviews, the supervisor and staff member shall plan for the upcoming performance review period by anticipating pending responsibilities and identifying development opportunities. Completion of the annual staff appraisals is reviewed by an Internal Audit representative during the department’s audit.

Probationary Staff Appraisals

The probationary period and the probationary staff appraisal should be discussed with the staff member at the time of hire. A staff member is eligible for a probationary appraisal after completion of three months of service and no later than six months of service (unless a contractual employee). The probationary appraisal consists of a review of the staff member’s performance and behavioral factors. The supervisor is also encouraged to include overall comments. At this time the supervisor will make a decision regarding the staff member’s continued employment with the University. Failure to complete and submit the review by the sixth month of employment will result in permanent status for the staff member. Human Resources staff provides supervisors notification prior to the scheduled appraisal date, however, it is ultimately the supervisor’s responsibility to submit the probationary appraisal in a timely manner.

The standard probationary review form is located on the Department of Human Resources website, under “Paper Forms.” There are two standard probationary appraisal forms:

Non-Exempt (for hourly employee) Probationary Appraisal:
http://www.olemiss.edu/depts/hr/paperforms/prob_app_nonexempt.pdf
Exempt (for salary employee) Probationary Appraisal:

http://www.olemiss.edu/depts/hr/paperforms/prob_app_exempt.pdf

Once completed with all of the appropriate signatures the original appraisal must be forwarded to the Department of Human Resources. The department and the staff member should retain a copy for their records.

**Annual Staff Performance Appraisals**

The annual staff performance appraisal should be completed once a year and submitted by April 30th of each year. The performance under consideration is for work performed from March 1st of the prior year to February 28th of the current year. The window to access, complete, and submit the online appraisal form is March 1st to April 30th.

The annual appraisal consists of a review of the staff member’s performance and behavioral factors. The supervisor is also encouraged to include overall comments. Supervisors, managers, and directors will be reviewed on additional factors. Human Resources staff will provide supervisors notification prior to the scheduled review date.

The annual appraisal form is accessed through the University’s myOleMiss portal from March 1st to April 30th each year.

The outcome of a successful performance appraisal is that the supervisor and the staff member should have a face-to-face dialog of the staff member’s past performance and a plan for future performance. It is recommended that the staff member receive a copy of the performance appraisal form in advance for review.

The supervisor and staff members will discuss what the employee has done well and what needs improvement. They will discuss how to improve and develop a plan to achieve goals.

After completion of the face-to-face meeting, the supervisor will submit the review online. A completed appraisal should include:

- A. appraisal of current period performance (March 1st of the prior year to February 28th)
- B. plan for the upcoming review period to be appraised
- C. performance development plan – required for any areas rated “rarely meets job requirements”
- D. comments (required for “rarely” and “consistently exceeds” ratings) and overall comments
- E. “Final/Approve” electronic signature of the supervisor, and
- F. date the meeting was conducted

The staff member will access the appraisal on the myOleMiss portal, acknowledge receipt of the appraisal, and submit it for the supervisor’s manager to review. The staff member will have an opportunity to include comments. The number of approvals is determined by the Vice Chancellor of each area. The appraisal must be acknowledged by the employee and the approval process completed by April 30th as the online system does not allow for late appraisals.

Performance appraisals may also be utilized in a progressive disciplinary process to resolve continuing poor performance.
**Note:** Contact Human Resources if an employee has transferred in or out of your department. An annual appraisal may be required.

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<th>IMPORTANT DATES TO NOTE</th>
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<tr>
<td>Annual Staff Appraisal Period</td>
<td>Review performance performed from March 1st of the prior year to February 28th</td>
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<tr>
<td>Online maintenance</td>
<td>Submit your organization chart or any changes to an employee’s reporting structure to Human Resources during the months of January and February</td>
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<tr>
<td>Online performance appraisal window</td>
<td>Submit the online appraisal on or after March 1st to April 30th</td>
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| Deadline for online annual appraisal                | 11:59 PM on April 30th  
The window of the online system will close as scheduled and does not allow for late appraisals |