Employee and Labor Relations
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MEMORANDUM

TO: **All NMSU Supervisors and Primary HR Liaisons**

THROUGH: **Dr. Gena Jones, Assistant Vice President**   *Gena W. Jones*
                  Human Resource Services

FROM: **Donna Ottaviano, Senior Employee Relations Specialist**
                  HRS Employee and Labor Relations

DATE: **November 30, 2021**

SUBJECT: **Annual Staff Performance Evaluation Period**

Our annual staff performance evaluation process is fast approaching. Feedback on performance is one of the most important managerial responsibilities. The purpose of this memo is to give you information and tools to assist with the process. This year, the focus is on recognizing staff excellence and contributions to LEADS 2025 goals and to ***Reflect and Re-Envision***. Please review the information carefully and let us know if you have any questions.

> **Performance Period: January 1, 2021 - December 31, 2021**
> **Exempt and Nonexempt Evaluation Forms Due (electronic process): March 16, 2022**

Why is the Annual Staff Performance Evaluation Process Important?

The annual evaluation is much more than just rating job performance categories:

- <u>Increase employee engagement</u> – Providing employees with positive recognition or praise results in increased employee engagement.
- <u>Identify promotion opportunities and spot talent</u> - Performance evaluations are a great way to identify and nurture your talent. It's an important tool for bringing out the best of your people.
- <u>Identify training needs</u> – This is an opportunity to work with your employees on solutions, such as additional training or support, or redefining roles.
- <u>Improve overall performance</u> - Your department's success in reaching LEADS 2025 goals relies on the efforts of each team member. Reviews help provide clarity about goals and expectations, and provide a benchmark so you can see when an individual's performance slips.

- Strengthen relationships and loyalty - Employees who trust and respect their leadership often feel more empowered and motivated to do their best, which reduces employee turnover and its costs.

What is meant by *Reflect and Re-Envision*?

To Re-Envision means to see something again, especially in a different way. Isn't that what we all did in 2021, as we were faced with many "pivot opportunities"?

As you look back (Reflect) and consider how to evaluate your staff, keep in mind the contributions they made toward overcoming the many transition issues in 2021, such as transition from working at home to working in the office. Masking, vaccine and testing mandates created another level of stress and need for critical thinking. The "Areas for Improvement" section is the ideal place to document your discussion with an employee about a problem area, the identified root cause and implementing a solution. We all worked together in solving many challenges associated with serving our students, customers and community regardless of whether in person, or virtually. Focus on resilience, adaptability and capacity to look forward and see things differently. How did they contribute to making things easier, more efficient, more robust? Teamwork and collaboration were at a premium this past year.

ENHANCEMENTS:

- A "Performance Summary" box has been added to allow the supervisor to provide overall comments on the employee's performance.
- A "Cancelled" category has been added for those goals that aren't relevant now or in the future.
- A link has been added within the system to access Training Central for review of employee courses completed or to assign development activities.
- A link has been added within the system to access the Position Classification database, where you can search for your employee's position for a quick review.
- The "Self-Assessment Form" has been updated and the same form is used for both exempt and non-exempt staff.
- "Areas for Improvement" from the previous year (if there were any) will flow over and be viewable in the new evaluation.

Please note: Faculty, Term, temporary, student employees or Post Doc/Graduate Assistant employees **ARE NOT** evaluated using the electronic system.

LEADS 2025 Strategic Goals:

Supervisors must align **ALL** employee goals to a NMSU Leads 2025 goal in the 'Planning for Year Ahead' section of the evaluation (non-exempt and exempt forms) and in the Senior Administrator forms. Supervisors will also list an objective and action that **aligns directly to the NMSU Leads 2025 goals** and describe the measurement for the action item. Following is a link to the goals: https://leads2025.nmsu.edu/. A link will also be provided within the evaluation system.

You may consider taking some time over the next month to re-familiarize your staff with the LEADS 2025 goals and how your department's work supports NMSU's strategic goals.

Training Opportunities:

The following Zoom sessions are scheduled to help with using the system, and to provide guidance on how to evaluate staff. For those who are unable to attend, a recorded session will be placed on the ELR Evaluations & Performance Management page, Tools for Employees and Supervisors section.

December 15	Wednesday	10:00am-11:00am	https://nmsu.zoom.us/j/96486368595
January 5	Wednesday	9:00am – 10:00am	https://nmsu.zoom.us/j/97353393378
January 10	Monday	11:00am – 12:00pm	https://nmsu.zoom.us/j/94820541808
January 21	Friday	1:30pm – 2:30pm	https://nmsu.zoom.us/j/94774282869
January 27	Thursday	3:00pm – 4:00pm	https://nmsu.zoom.us/j/96723350897
February 4	Friday	9:00am – 10:00am	https://nmsu.zoom.us/j/95295961886
February 9	Wednesday	10:00am – 11:00am	https://nmsu.zoom.us/j/96281488077
February 24	Thursday	3:00pm - 4:00pm	https://nmsu.zoom.us/j/97843875924
March 3	Thursday	3:00pm – 4:00pm	https://nmsu.zoom.us/j/96474252147

We encourage you to pre-register for any of the above courses through Training Central, "2022 Annual Staff Performance Evaluation Process."

Reminder: The deadline to complete performance evaluations is March 16, 2022.

The following pages have some general guidelines to help with the evaluation process.

Contact the ELR office at ELR@nmsu.edu if you have questions.

ANNUAL STAFF PERFORMANCE EVALUATION GUIDELINES
November 30, 2021

Exempt and Nonexempt Evaluation Forms
Performance evaluations for all exempt and nonexempt regular employees employed in 2021 must be completed using the electronic evaluation form.   The overall rating will be numerically calculated within the electronic web application system. The electronic application will be available beginning December 6th. All electronic evaluation forms must be completed no later than **March 16, 2022**. The link to the electronic application is located at https://evaluation.nmsu.edu. A link to the User Guide and helpful hints can also be at: https://hr.nmsu.edu/evaluations.

Many of our employees are still working remotely, either full-time or part-time. If you aren't able to meet in person to review the evaluation, plan to meet with your employees through Zoom, Teams or another video format. It's more personal and humane.

Technology requirements
We recommend using the following browsers when accessing the web application system: Mozilla Firefox, Chrome, or Safari.

You must use VPN if working off-campus, or on a non-NMSU network. If experiencing problems with access, or the VPN download visit VPN Install Instructions

For additional assistance contact the ICT Help desk:
- 575-646-1840
- help@nmsu.edu
- Virtual helpdesk Zoom meeting ID: icthelpdesk

Self-Assessment
An optional, but *highly recommended* companion document for exempt and nonexempt employees, called the *Self-Assessment Form,* is also available for supervisors to obtain feedback from their employees regarding their performance, accomplishments, and training needs. The self-assessment form is available in a Microsoft Word version at Self Assessment Form for Nonexempt and Exempt Staff. The form content has been revised and now the same form is used for Exempt and Non-Exempt staff. Please remember this document is for internal department use and doesn't require submittal to HR Services.   However, **nonexempt** employees may request, through their supervisor, to have their completed self-assessment form submitted to HR Services to be filed in the official personnel file with their performance evaluation.

Tracking evaluation status
When the evaluation period opens, supervisors should select their employees and add them to their inbox within the system. Supervisors have the ability to track the status of their employees' evaluations by logging into the evaluation application. Once an employee evaluation has routed to the Next Level Approver or to the employee, the Immediate Supervisor will see that the employee's evaluation has moved to the Sent Items box. It will indicate that the status is 'pending next level approval', 'in process by immediate supervisor', 'pending employee acknowledgement', etc. and it will indicate the name of the person it is pending action with.

Evaluation Flow

1. Evaluations are completed by the supervisor in the system.
2. The supervisor routes the evaluation to the next level supervisor.
3. The next level supervisor reviews and approves the evaluation.
4. The supervisor schedules a meeting with the employee to discuss the evaluation.
5. After reviewing the evaluation with the employee, the supervisor signs the evaluation, which automatically routes it to the employee.
6. The employee signs the evaluation.

Use the following link to view a complete User Guide on how to use the Evaluation System, including detailed instructions and screen shots: [Evaluation System User Guide](#)