

2021 OPE Supervisor Guidelines for Staff Appraisals

The appraisal process helps staff to better understand how their contributions are viewed at USF, and to think creatively about their future career goals. The appraisal process is one we view as positive and clarifying; one that should assist in the identification of mutually shared objectives. Yearly appraisals for all OPE members are also required by the collective bargaining agreement between the University and OPE, Local 29. The concepts listed below were mutually agreed to by both parties in the labor agreement. They are meant to assist supervisors as they prepare for and complete the appraisal process.

Supervisor

1. Staff member should **complete the Staff Self-Appraisal on or before April 19, 2021.**
2. Supervisor schedules appraisal appointment with the staff member.
- **Appraisal meeting will generally be held between April 19 and May 7, 2021.**
3. In preparing for the appraisal, the Supervisor should review staff member's previous evaluation. The supervisor should also be prepared to discuss the staff member's current Self-Appraisal.
4. Supervisor meets with staff member for appraisal and reviews the Staff Self-Appraisal.
5. Supervisor ensures that all issues in the Staff Self-Appraisal have been covered and job responsibilities, future goals, etc., are reviewed. Supervisor sets goals and target completion dates, and discusses suggestions for development activities with staff member (e.g., HR professional development, new assignments or projects).
6. The supervisor prepares the written Supervisor Appraisal and gives it to the staff member.
- **Supervisor will give their evaluation to the staff member no later than May 7 2021.**
7. Staff member will have five (5) days after receiving the supervisor's Appraisal to review and sign both the Staff Self-Appraisal and the Supervisor Appraisal, attaching any comments to the Supervisor Appraisal if necessary. If needed, the staff member will make a follow-up appointment with their supervisor to discuss comments. The staff member returns both appraisals to the supervisor **no later than May14, 2020**, keeping a copy for their own records.
8. Supervisor insures that the staff member reviews and signs the Supervisor appraisal, attaching any comments to the Supervisor appraisal if necessary.
9. Supervisor should forward copies of both Appraisals and attachments to Human Resources.
- **Both evaluations should be received by Human Resources no later than May 14, 2021.**
10. Throughout the year, the supervisor and staff member should continue discussions about job responsibilities and how they have changed, periodically checking progress towards performance goals. A mid-year evaluation should be scheduled in the fall.

Supervisor Appraisal Form for OPE Staff

Staff Member's Name: _____ Classification: _____

Supervisor's Name: _____ Department: _____

It is recommended that this Supervisor Appraisal form be completed in draft form by the supervisor and reviewed by her/his/their manager before being discussed and finalized with the OPE staff member.

1. List the staff member's major accomplishments during the past year. In what specific ways did these support the University's and department's goals?
2. List specific examples of the staff member's strengths and how they relate to the quality and scope of the staff member's work.
3. Describe any difficulties or problems encountered in the workplace and the actions taken by the staff member to overcome these difficulties or problems.
4. Describe any professional job-related weaknesses and areas needing improvement.
5. List your goals and objectives for this staff member for the next year.
6. Describe the staff member's overall performance for this period. Give specific examples to support your assessment.

Please see staff member's attached comments.

Employee: _____ Date: _____

Department Chair: _____ Date: _____
(if applicable)

Supervisor: _____ Date: _____

2021 OPE Staff Self-Appraisal Guidelines and Form

The appraisal process will assist staff to better understand how their contributions are viewed at USF and to think creatively about future career goals. The appraisal process is one we view as positive and clarifying; one that should assist in the identification of mutually shared objectives. Yearly appraisals for all OPE members are also required by the collective bargaining agreement between the University and OPE, Local 29.

The concepts listed below were mutually agreed to by both parties to the labor agreement. They are meant to assist you as you prepare for and complete the appraisal process.

Staff Member

1. 1. Staff member prepares Self-Appraisal and gives it to the supervisor at least two (2) days prior to the appraisal meeting, keeping a copy for their own records. In preparation for the appraisal, the staff member should review their previous evaluation.
 - Staff member should have the Self-Appraisal completed on or before **April 19, 2021**
 - Appraisal meeting will generally be held between **April 19 and May 7, 2021.**
2. Staff member meets with the supervisor for appraisal appointment and reviews the Self-Appraisal with the supervisor. The staff member should ask questions to clarify and ask for specific examples if the supervisor is talking in generalities. The staff member should ensure that all issues in the Staff Self-Appraisal have been covered and job responsibilities, future goals etc., are reviewed. Staff member and supervisor set goals, target completion dates, and discuss suggestions for development activities (e.g., HR professional development, new assignments or projects).
3. Staff member should make notes after the appraisal meetings of any areas of disagreement.
4. Staff member will have five (5) days after receiving the Supervisor's Appraisal to review and sign both the Staff Self-Appraisal and the Supervisor Appraisal, attaching any comments to the Supervisor Appraisal if necessary. If needed, the staff member will make a follow-up appointment with their supervisor to discuss comments. The staff member returns both appraisals to the supervisor, keeping a copy for their own records.
 - Staff member will receive the Supervisor Evaluation no later than **May 7, 2021.**
 - Staff member will return both evaluations to their supervisor no later than **May 14,, 2021**
5. Throughout the year, the staff member and the supervisor should continue discussions about job responsibilities and how they have changed, periodically checking progress towards performance goals. A mid-year evaluation should be scheduled.

OPE Staff Self-Appraisal Form

Name: _____

Classification: _____ Dept.: _____

This questionnaire must be completed by the employee prior to the appraisal meeting. In cases where the staff member believes a particular question is not applicable, the question should be discussed with a supervisor prior to the appraisal meeting. Answer the following six questions, as thoroughly as possible, on separate paper. Please sign and date all attachments.

1. What were your major accomplishments during the past year; be as specific as possible:
2. List your job-related strengths; please give examples of how you utilize these strengths during the past year:
3. Identify any difficulties or problems encountered in the workplace and actions you took to overcome these difficulties or problems:
4. Identify any job-related weaknesses or areas where you believe additional development is needed:
5. What are your professional goals and objectives for the next year at USF:
6. What resources can be provided which would assist you in meeting future goals/objectives:

Are there any additional comments, observations or suggestions you care to make which would help your supervisor and the University evaluate your job performance?

Employee: _____ Date: _____

Supervisor: _____ Date: _____