

## 2023 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 in USFWorks between March 11 and March 22, 2024.**
2. Manager completes Manager Appraisal in USFWorks between March 25 and April 12, 2024.
3. Manager's Manager reviews and approves the completed appraisal in USFWorks between April 15 and April 26, 2024.
4. Manager schedules one-on-one appraisal appointment with the staff member.  
- **Appraisal meeting will be held between April 29 and May 10, 2024.**
5. 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.
6. Supervisor meets with staff member and reviews the approved Performance Appraisal.
7. 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).
8. **Supervisor will give their evaluation to the staff member between April 29 and May 10, 2024.**
9. Staff member will have five (5) days after receiving the supervisor's Appraisal to review and sign the completed Appraisal, entering any comments in the comment section of the Appraisal if necessary. If needed, the staff member will make a follow-up appointment with their supervisor to discuss comments. The staff member acknowledges the appraisal **no later than May 10, 2024**, printing a copy from USFWorks for their own records if they so choose. The performance appraisal will be archived and available to the staff member in USFWorks.
10. Supervisor ensures that the staff member reviews and electronically signs the completed appraisal in USFWorks, entering any comments if necessary.
11. 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.

## **OPE Appraisal Template**

Below is the OPE appraisal form that will be completed in USFWorks by the OPE staff member and then will be reviewed by their manager and manager's manager before being discussed and finalized with the OPE staff member.

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

## 2023 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. 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 **March 22, 2024.**
  - Appraisal meeting will generally be held between **March 25 and May 10, 2024.**
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 the final appraisal in USFWorks, adding 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 **April 29, 2024.**
  - Staff member will acknowledge the final appraisal in USFWorks no later than **May 10, 2024**
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.

## **SAMPLE OPE Staff Self-Appraisal Form**

This is the sample questionnaire that must be completed by the employee by the designated due date in USFWorks. In cases where the staff member believes a particular question is not applicable, the question should be discussed with a supervisor prior to completing the self-appraisal. Answer the following six questions, as thoroughly as possible.

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