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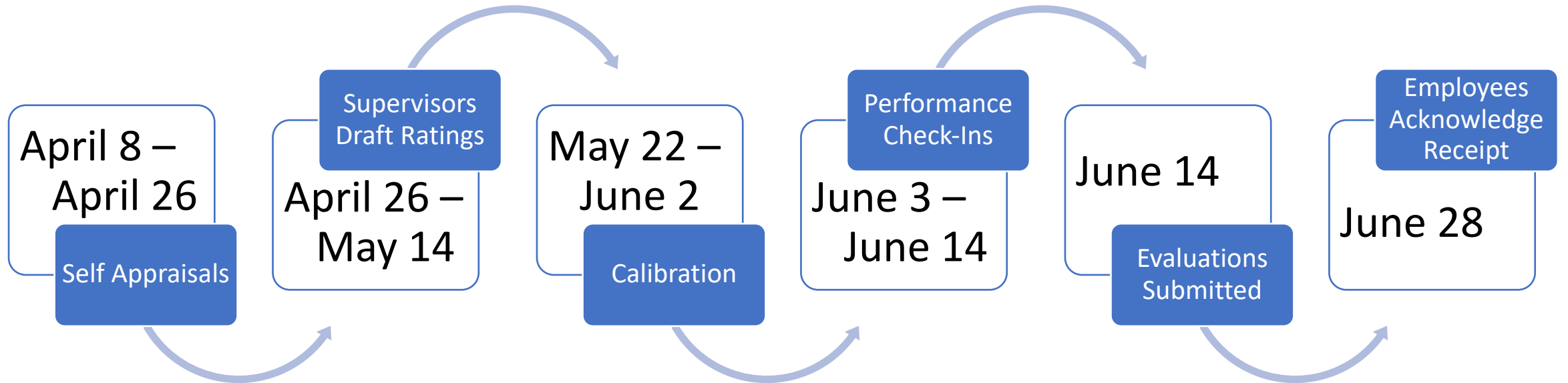
All Staff Performance Appraisal Series

Understanding the Process

UMSL | We transform
LIVES

UNIVERSITY OF MISSOURI-ST. LOUIS

Timeline



Supervisors Draft Ratings

- Supervisor considers employee's job description and job expectations
- Supervisor reflects on employee's past year performance
- Supervisor drafts comments on and examples of employee's performance
- Supervisor reviews employee's self appraisal
- Supervisor reviews the rating scale definitions
- Supervisor considers how employee's performance in relation to employee's job expectations fits within the rating scale definitions
- Supervisors enter employee's draft review in PeopleSoft

April 26 –
May 14

Supervisors
Draft Ratings

Supervisor considers how employee's performance in relation to employee's job expectations fits within the rating scale definitions

Correct	1 – Needs Improvement <ul style="list-style-type: none">• Does not consistently meet all expectations• Additional direction and support is required
	1.5 – Reliably Delivers <ul style="list-style-type: none">• Consistently meets expectations• Sometimes needs additional direction and support beyond what would be expected in the role
Grow	2 – Reliably Delivers <ul style="list-style-type: none">• Consistently meets expectations and• might exceed some expectations• Requires little to no additional direction to achieve established responsibilities
	2.5 – Reliably Delivers <ul style="list-style-type: none">• Frequently delivers beyond that which would be expected in the role
Promote	3 – Consistently Exceeds <ul style="list-style-type: none">• Consistently exceeds or delivers beyond expectations• Influences others to perform better

1 – Needs Improvement

- Does not consistently meet all expectations
- Additional direction and support is required

Behaviors that might result in a 1 rating:

- Missing deadlines
- Work is not getting done
- Work quality is unacceptable
- Attendance Issues
- Creates or escalates conflicts

Documentation and/or actions associated with a 1 rating:

- Documentation of previous conversations
- Specific examples of unacceptable behavior or work product
- PIP

1.5 – Reliably Delivers

- Consistently meets expectations
- Sometimes needs additional direction and support beyond what would be expected in the role

Behaviors that might result in a 1.5 rating:

- Work ultimately gets done but employee might not really deserve the credit
- Might get the quality to an acceptable level eventually but not on the first try and not without extra guidance
- Is not always meeting attendance expectations or requires oversight to meet attendance expectations
- Doesn't have serious conflicts with colleagues but does not have great working relationships and/or requires some level of mediation support

Documentation and/or actions associated with a 1.5 rating:

- Documentation of previous conversations
- Specific examples of below standard behavior or work product
- Specific examples of support beyond what would be expected
- Action plan
- Letter of expectation
- Additional training

2 – Reliably Delivers

- Consistently meets expectations and
- might exceed some expectations
- Requires little to no additional direction to achieve established responsibilities

Behaviors that might result in a 2 rating:

- Does everything that's asked of them, sometimes a bit more
- Work gets done on time
- Work quality is very good
- No attendance issues
- Works effectively colleagues
- Requires a level of support that's appropriate for the position

Documentation and/or actions associated with a 2 rating:

- No special/additional documentation required
- Typically, this is the score for approximately 60-70% of employees

2.5 – Reliably Delivers

- Frequently delivers beyond that which would be expected in the role

Behaviors that might result in a 2.5 rating:

- Goes above and beyond what is asked
- Work quality is usually better than expected
- Work is done in less time than expected and/or is able to complete more work than expected
- Has very positive work relationships with colleagues

Documentation and/or actions associated with a 2.5 rating:

- Can provide multiple, specific examples of how work exceeds expectations from different quarters

3 – Consistently Exceeds

- Consistently exceeds or delivers beyond expectations
- Influences others to perform better

Behaviors that might result in a 3 rating:

- Work product is truly exceptional – almost always
- Has excellent work relationships with colleagues
- Positively influences and/or brings out the best in others

Documentation and/or actions associated with a 3 rating:

- Artifact documentation
- Specific examples of work that exceeds expectations from all four quarters
- Specific examples of this employee's positive effect on the team

Calibration

Calibration is the process of reviewing performance evaluations to ensure consistency across units, college/school/division, and UMSL

At UMSL, Vice Chancellors will review draft ratings of their units and discuss with leaders to help catch errors, ask about patterns, etc.

Calibration is NOT Vice Chancellors forcing supervisors to change scores

May 22 –
June 2

Calibration

Why Calibrate?



Consistency



Fairness



Growth



Accountability



Costs of miscalibration

Demotivates High Performers

Complicates addressing performance issues

Defeats the growth tool value

Creates difficulty in identifying who to recognize and
compensate

Merit Based Pay Increases

Merit-based pay is one type of pay increase, designed for a particular purpose

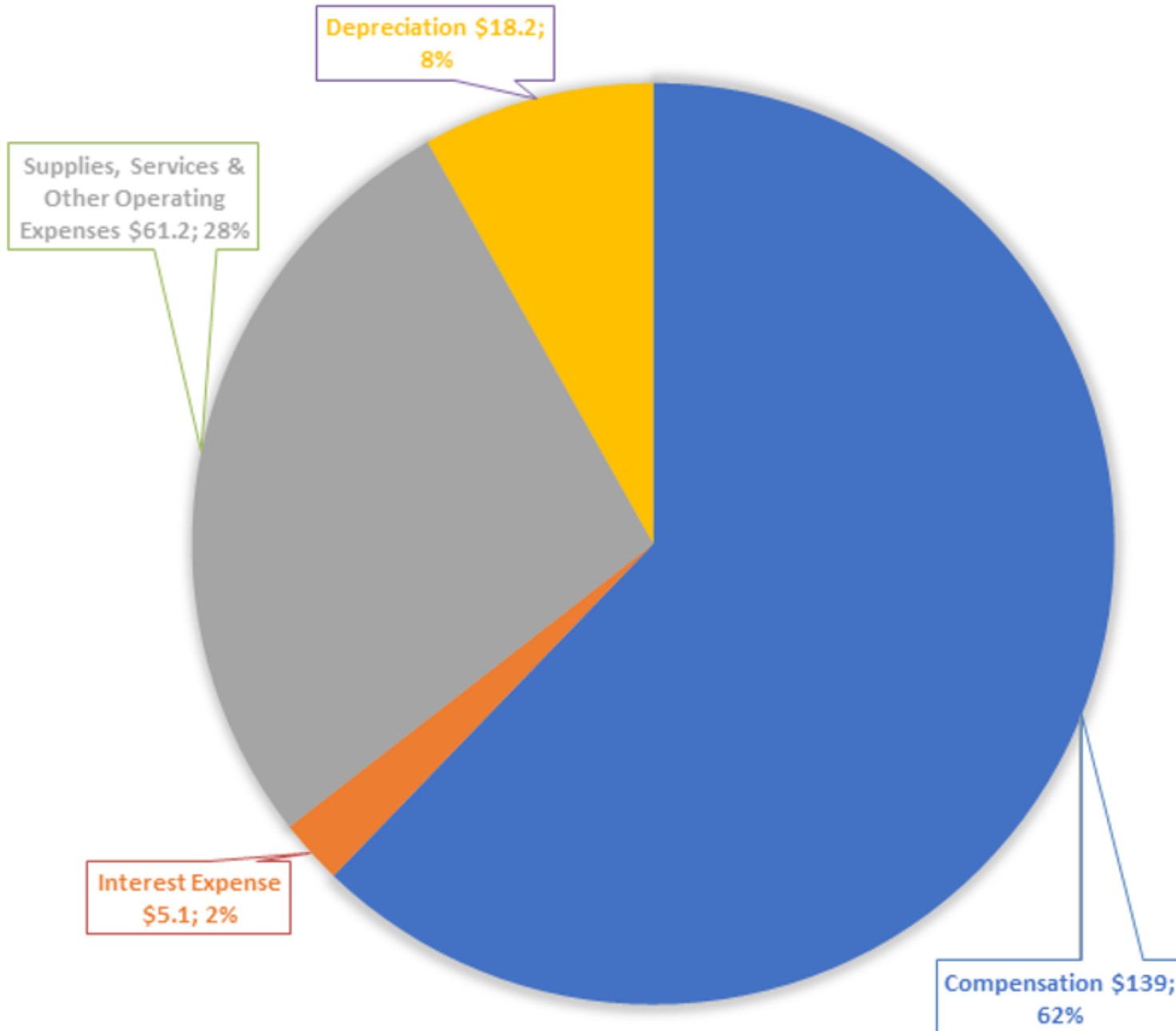


← Lower Score,
Lower % Increase

The goal of merit-based pay is to reward performance, with employees with higher performance receiving the largest increases

Higher Score,
Higher % Increase →

FY23 BUDGET - OPERATING EXPENSES \$224 MILLION



Compensation accounts for 62% of UMMSL's Operating Expenses

This year, justification has allocated 3% of the payroll budget for merit-based pay increases

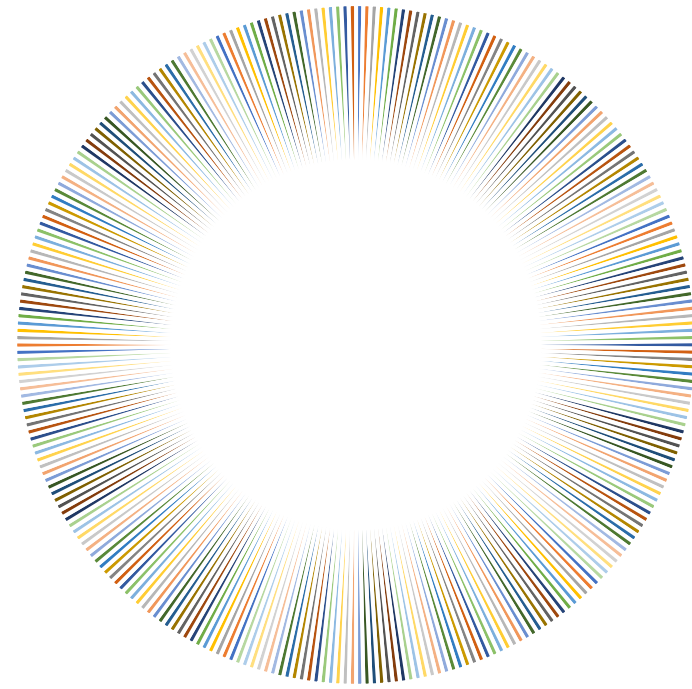
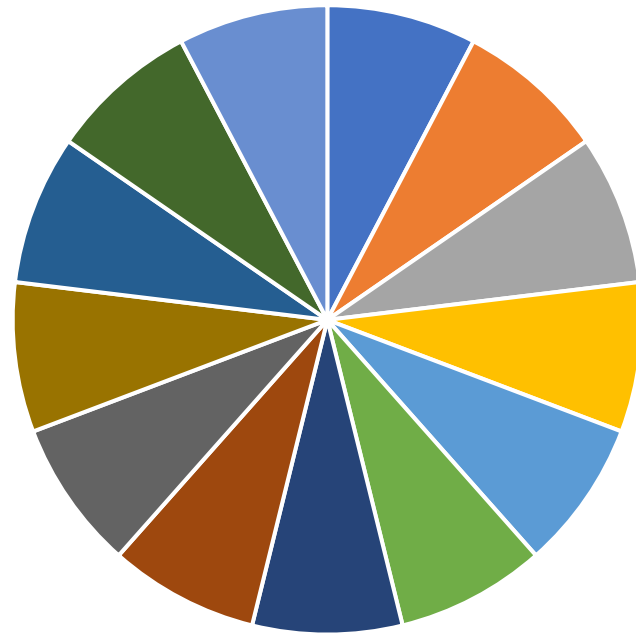
UMMSL
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Rating Distribution & Merit Pay

We will have a set amount of money allocated for merit increases

The total amount of money allocated to merit increases remains the same regardless of the rating distribution

Thus, the rating distribution does not affect the total amount of money allocated – it effects *how* the total amount is allocated



Performance Check-Ins

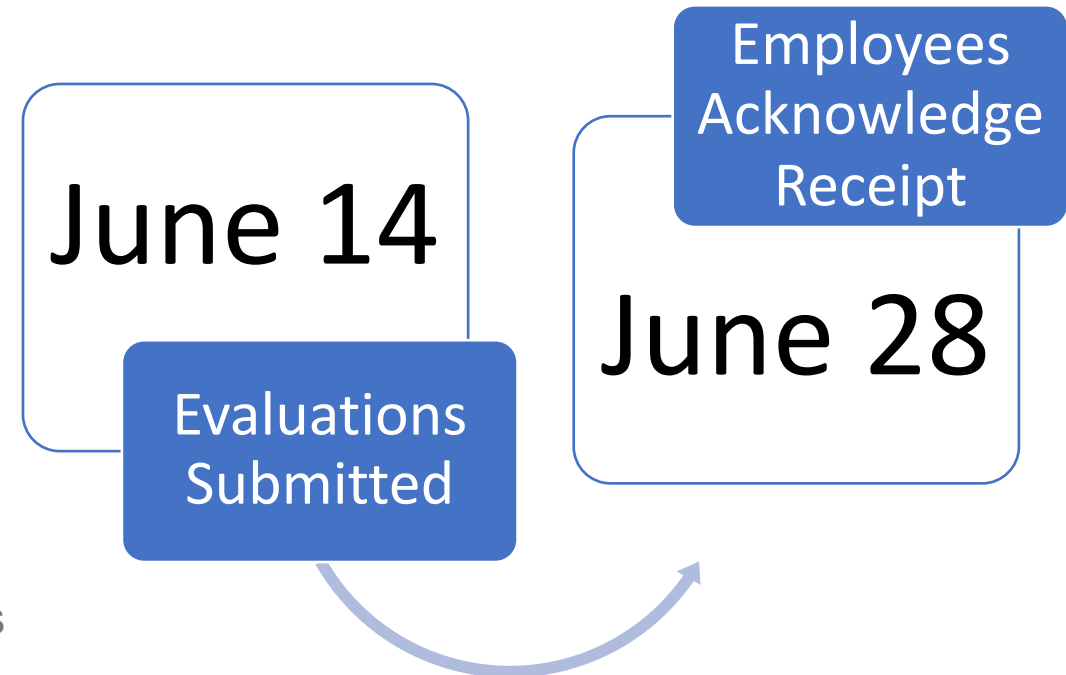
- Your supervisor will reach out to schedule a meeting
- At your meeting you can expect to discuss
 - Your job expectations
 - Your self appraisal
 - Accomplishments
 - Challenges/setbacks
 - Resources/training
 - Career development
 - Your supervisor's evaluation of your performance
- Join us for the next part in this series to get yourself prepared to approach feedback in a productive way

June 3 –
June 14

Performance
Check-Ins

Evaluation Submitted & Received

- Supervisor reviews and submits evaluation
- Employee receives an email notice of submission
- Employee checks a box to acknowledge receipt
- Employee may also enter comments into the comment box
- Supervisor receives an email notice that employee has acknowledged receipt and can review employee comments
- Join us for the final session in this series to discuss what to do after you've received your evaluation



What are your takeaway messages and/or lingering questions?



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Next in this Series

Part 3 – Approaching Feedback

Wednesday, May 29, from 12 – 1pm CT

Part 4 – What Now?

Thursday, June 20, from 12 – 1pm CT

