



December 15, 2017

To: Managers of Non-Exempt Staff in the Provost's Division
From: Margaret N. Freije
Provost and Dean of the College
Re: Annual Performance Reviews

I am emailing to announce the **2018 Non-Exempt Staff** performance review process in the Provost's Division and to remind you of the important dates. Human Resources encourages clear feedback and discussion between the manager and employee throughout the year, but requires certain procedures during the formal review.

Managers of hourly staff are required to conduct meetings with staff to discuss job performance, expectations, assist in setting goals, and to acknowledge accomplishments and contributions of employees, as well as to relay any concerns regarding performance. The employee and the manager should agree on goals that are specific, measurable and align with the needs of the department.

As part of this process, a written formal review form must be completed, in which the employee's performance is assigned a rating. This rating serves as the basis of the employee's merit raise, which is effective on the first day of the new fiscal year, July 1, 2018. Once the Provost reviews the **2018 Non-exempt Performance Review Form**, the paperwork is then filed in the employee's personnel file in the Department of Human Resources.

Dates and Time Period for Review:

The review kick off is Tuesday, January 2, 2018. Managers should conduct meetings with their direct reports by Monday, January 29, 2018. Completed and signed forms should be submitted to the Provost Office via secure email (provostreview@holycross.edu) by Monday, February 5, 2018.

The "period under review" is defined as the 2017 calendar year. Please evaluate achievements from January 1, 2017 – December 31, 2017 so that we can understand how the employee fulfilled their responsibilities and, in so doing, served the department and the College as a whole. Employees should set annual work and professional development goals for the time period of July 1, 2018 – June 30, 2019.

Guidance for Dual Reporting Review:

A number of employees in the Provost's Division have a dual reporting relationship with an additional manager. While the primary manager may be the supervisor of record, the additional manager may oversee a body of work or specific projects. Both managers are encouraged to conduct a review. If appropriate, the other manager might complete a separate **Performance Review Form** based on separate duties, however both managers must agree upon a single overall rating for the employee. Both reviews should be submitted to provostreview@holycross.edu.

Performance Review Forms and Process:

In preparation for a review meeting, the employee should submit documents related to their performance. Some suggested materials may be:

- Prior year performance review;
- Revised performance evaluation specification (job description);
- Completed ***2018 Non-Exempt Self Evaluation form***.

The review forms can be found on the Holy Cross Human Resources website. These include the ***2018 Non-Exempt Self Evaluation Form*** (for the employee) and the ***2018 Non-Exempt Performance Review Form*** (for the manager). You may view the review directions and download the forms at this link.

<https://www.holycross.edu/human-resources/performance-development-program-forms>

In order to ensure consistency in rating, please use the most recent form. Using past forms makes the evaluation challenging in that employees will be evaluated differently across the Division.

Once managers have conducted the meeting and received input from the employee, managers should complete the ***2018 Non-Exempt Performance Review Form***. The review form, signed by both the manager and employee, should be submitted to provostreview@holycross.edu by Monday, February 5, 2018. Please give a copy of the signed review paperwork to the employee.

Rating:

We ask that you give employees an overall rating of ***“outstanding”*** for an exceptional year, ***“very good”***, for employees who go above and beyond expectations of their position, ***“good”***, for employees who are completing all requirements, ***“needs improvement”***, for employees who have significant areas requiring work, or ***“unsatisfactory”*** for employees who are not meeting the requirements of their position. For employees who are rated as ***“outstanding”***, managers should elaborate as to how the employee has performed above and beyond expectations of the position. Please contact Helene Uysal (x2542) if an employee is not meeting position requirements.

Special Consideration:

As we have done in past years within the Provost’s Division, we would like to recognize and reward accomplishments and contributions of non-exempt staff members who, in the year under review, have taken on significant duties beyond their standard job responsibilities in order to help the department achieve significant goals. We, once again, have reserved a limited amount of funds for that purpose. If, in your estimation, any staff member in your area should be considered for such an award please submit your recommendation to Helene Uysal (huysal@holycross.edu) by Monday, February 5, 2018. This recommendation is separate from the evaluation you have prepared for HR and should detail the additional duties and the ways in which the staff member demonstrated excellence in the completion of these duties..

Staff who did not previously receive an award will be given strongest consideration.

Thank you for the attention that I know you will give to this task.

cc: David Achenbach, Director of Human Resources
Helene Tingle Uysal, Director of Academic Budget and Operations