

January 21, 2021

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

I am writing to announce the **2021 Non-Exempt Staff** performance review process. Human Resources encourages clear feedback and discussion between the manager and employee throughout the year, but requires certain procedures during the formal review. Once we review the 2021 Non-Exempt Performance Review Form, it will then be filed in the employee's personnel file in the Department of Human Resources.

Managers of hourly staff are required to conduct meetings with staff to discuss job performance and 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 and the college.

As part of this process, a written formal review form must be completed, in which the employee's performance is assigned a rating. In the past, this rating has served as the basis of the employee's merit raise, which is effective on the first day of the new fiscal year, July 1, 2021. Due to the Covid-19 crisis, the College was unable to offer salary increases to staff in the current fiscal year. Managers will be asked to provide an average performance rating for the past two years (January 1, 2019 – December 31, 2020) to determine merit raises. Budgets are still under consideration for fiscal year 2022 (July 1, 2021 – June 30, 2022). Merit pools will be determined in Spring 2021.

Dates and Time Period for Review:

The performance review kick off is January 21, 2021. Managers should conduct meetings, most likely through zoom, with their direct reports by Monday, February 22, 2021. The completed and signed [Non-Exempt Performance Review Form](#) should be submitted via secure email to provostreview@holycross.edu by **Monday, March 1, 2021**. Please give a signed, finalized copy of the form to your employee. If you have concerns about getting a signed document given COVID, please reach out to Helene Uysal.

The "period under review" is defined as the 2020 calendar year. Please evaluate achievements from January 1, 2019 – December 31, 2020 so that we can understand how the employee fulfilled their responsibilities and, in so doing, served the department and the College as a whole. While the performance review will be based on the 2020 calendar year, the merit recommendation should be based on the 2019 and 2020 calendar years.

You and your employee should use the meeting to discuss the performance over the past calendar year, the plans to meet goals previously established for the remainder of the current academic year (January through June 2021), and set goals for the following academic year (July 2021 through June 2022).

Guidance for Dual Reporting Review:

A number of employees in the Division have a dual reporting relationship with an additional manager. While the primary manager may be the manager 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 [Non-Exempt 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 provide documents to their manager related to their performance.

- Prior year performance review;
- Revised performance evaluation specification (job description);
- Completed [Non-Exempt Employee Self Reflection Form](#).

The 2021 Non-Exempt Performance Review Form can be found on the [Holy Cross Human Resources website](#). Please review the directions and download the forms at the Human Resources Forms page. You may start the process at any time.

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.

Rating:

Please provide an average rating for the 2019 and 2020 calendar years. 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 meeting expectations, ***“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 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 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, March 1, 2021**. 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 have not previously received an award will be given strongest consideration.

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

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