



# LOYOLA

UNIVERSITY MARYLAND

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**MORE THAN READY.  
LOYOLA READY.**



# Annual Performance Evaluation Process for Employees

Loyola Human Resources Department  
2024



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# What Is Performance Management?

- Process of creating a work environment in which people can perform to the best of their abilities
- Aligns employee contributions with goals and values of the institution
- Ongoing process
- Employees should play a major role in their own planning and development



# The Annual Evaluation Process

- The Employee completes the required self-evaluation
- The Supervisor prepares an evaluation
- The second level Supervisor approves the evaluation
- HR calibration period
- The Supervisor meets with the Employee and discusses the evaluation, and Supervisor adds any final comments
- The Employee adds comments and signs-off.
- The Supervisor signs-off.



# Why Self Evaluation?

- Enables you to position yourself with your supervisor in the most positive light
- Reminds your supervisor of your accomplishments
- You know what's involved to do your job on a day-to-day basis – accomplishing goals may not be as easy as it looks to your supervisor
- Opportunity to request development to further your advancement
- Supervisors are expected to consider your input



# Completing Your Self-Evaluation

- Be honest about your accomplishments – and be honest about how you can improve.
- Be specific, clear and succinct. Provide examples and documentation to back up what you say.
- Include statements and examples for scores above or below the expectations.
- If you make one of the goals N/A, you need to redistribute percentages assigned to other goals.
- Consider what you want to learn next.



# Evaluation Timeline

- Submit self-evaluation by **February 23, 2024**
- Supervisor write the evaluation by **March 15, 2024**
- Second Level reviews by **March 29, 2024**
- HR Calibration Review ends **April 12, 2024**
- Supervisor and employee meet to review evaluation, and sign off on the evaluation by **May 10, 2024**
- Evaluation is completed

# Time Period Covered by Annual Evaluation

- The review should cover any achievements from **March 1, 2023, through February 29, 2024.**





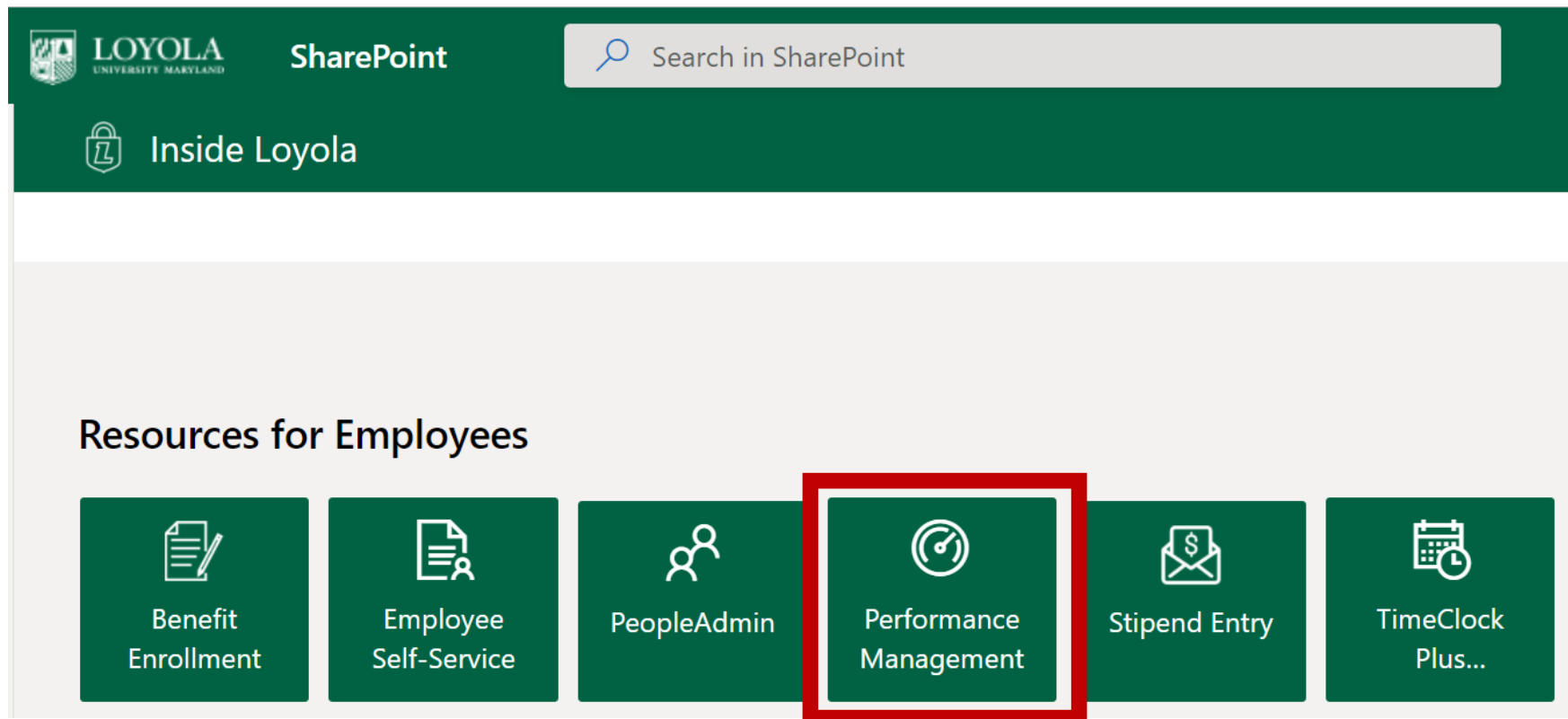


# Rating Scale of 1 to 5

- **1 - NEEDS IMPROVEMENT:** Consistently falls short of performance standards.
- **2 - BELOW EXPECTATIONS:** Sometimes meets the performance standards. Seldom exceeds and often falls short of desired results.
- **3 - MEETS EXPECTATIONS :** Meets all relevant performance standards. Occasionally exceeds desired results or objectives in one or more areas.
- **4 - EXCEEDS EXPECTATIONS:** Consistently meets and often exceeds all relevant performance standards. Shows initiative and versatility, works collaboratively, has strong technical & interpersonal skills.
- **5 - EXCEPTIONAL:** Consistently exceeds all relevant performance standards. Provides leadership, fosters teamwork, is highly productive, innovative, responsive and generates top quality work.

# Accessing Loyola's Performance Management System

- Inside Loyola Homepage



The screenshot displays the internal SharePoint homepage for Loyola University Maryland. At the top, there is a dark green header with the Loyola University Maryland logo, the word "SharePoint", and a search bar labeled "Search in SharePoint". Below the header, a green bar contains a lock icon and the text "Inside Loyola". The main content area is titled "Resources for Employees" and features a row of six green buttons with white icons and text. The buttons are: "Benefit Enrollment" (document icon), "Employee Self-Service" (document with person icon), "PeopleAdmin" (two people icon), "Performance Management" (target icon, highlighted with a red border), "Stipend Entry" (envelope with dollar sign icon), and "TimeClock Plus..." (calendar icon).

# Your Performance Management Homepage

The screenshot displays the Performance Management Homepage for Loyola University Maryland. At the top left, there is a navigation menu with a home icon and the university logo. The main content area is divided into several sections:

- Tasks (2) | All Tasks:** A section highlighted with a red box and a red arrow. It contains two task cards:
  - 1 day overdue:** A red card with the task "Complete your self-appraisal".
  - Due in 3 days:** A yellow card with the task "Employee signature".
- Share:** A section with a question "Do you have feedback to share?".
- Learning:** A section with a plus icon and the text "You are not enrolled in any learning activities." and a "My Learning" button.
- Goals:** A section with a plus icon and the text "You don't have any goals right now" and an "All Goals" button.
- Connections:** A section with a search bar "Find colleagues in your organization" and a card for "My Team (1)" featuring a profile for James Manager.
- Bookmarks:** A section with a link to "Human Resources Website".
- Development Plans:** A section with a plus icon and the text "You don't have any development plans right now".

# Self-Evaluation Form

Print Spelling Check Language Employee Records Appraisals

Save Changes Complete

## LOYOLA UNIVERSITY MARYLAND

### Annual Non-Supervisor Performance Evaluation Form

<b>Employee Name:</b>	<b>Title:</b>
<b>Department:</b>	<b>Supervisor:</b>

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*This evaluation covers the period of March 1st of the previous year to February 29th of the current year.*

Loyola University Maryland's Performance Evaluation Form is designed to link employee performance to Loyola's mission and values as reflected in the Jesuit tradition and to provide guidance and consistency to the evaluation process. It assists the supervisor in making decisions about employee development, merit increases, promotions and continuing employment. It should be used to summarize and evaluate the employee's overall performance for the past year, to establish results to be achieved for specific tasks or projects for the next year, and to identify professional development goals to enable the employee to enhance performance in the current position or to prepare them for future growth.

#### Procedures

1. The employee completes a self-evaluation (unless that requirement is waived by the supervisor).
2. The supervisor prepares a written evaluation for the employee.
3. The second level supervisor approves the evaluation.
4. Human Resources reviews evaluations and completes the calibration process.
5. The supervisor discusses the evaluation with the employee and adds final comments.
6. The employee adds comments and signs-off. The supervisor signs-off.



# What is being evaluated?

- Mission, Vision, and Values
- Job duties
- Previous goals
- New goals & professional development
- Core competencies
  - Cross-Cultural Sensitivity
  - Productivity/Quality
  - Dependability
  - Relationship Building/Customer Focus
  - Communication
  - Initiative
  - Analytical Thinking



# Evaluation Preview



## Loyola Mission, Vision, and Values

### Our Mission:

Loyola University is a Jesuit Catholic university committed to the educational and spiritual traditions of the Society of Jesus and to the ideal of liberal education and development of the whole person. Accordingly, the University will inspire students to learn, lead and serve in a diverse and changing world.

### Our Vision:

Loyola University Maryland, anchored in Baltimore, will be a leading national liberal arts University in the Jesuit, Catholic Tradition.

**Academic excellence** – promotes a love for learning, discovery, and integration across a wide range of disciplines and interests.

**Focus on the whole person** – honors, cares for, and educates the whole person by encouraging constituents to strive after intellectual, physical, psychological, social and spiritual health and well-being.

**Integrity and Honesty** – integrity and honesty that is manifested in an atmosphere of open, civil discourse and careful, respectful listening where freedom of thought and expression are valued and protected.

**Diversity** – encourages openness to new discoveries, ideas, methods, and perspectives and actively encourage and celebrate diversity in all forms.

**Community** – strives to define goals and values clearly so as to ensure unity of purpose and to encourage shared ownership for the University's mission and vision.

**Justice** – strives to foster global awareness, as well as a sense of solidarity with and care for all who struggle for justice. In particular, the University strives to foster awareness and understanding of first-world privilege, and of its attendant responsibilities for leadership and for advocacy of social and structural change.

**Service** – offers to all community members a rich variety of opportunities for solidarity and service both within and beyond the institution.

**Leadership** – identifies, develops, encourages, and rewards the exercise of gifts of leadership in all community members in all areas of their lives.

**Discernment** – encourages the practice of regular reflection and self-examination which foster awareness of the personal freedom (or lack thereof), a sense of personal responsibility for choices and actions, and a balance between enlightened self-interest and promotion of the common "greater" good.

**Constant Challenge to Improve** – strives for improvement on an ongoing basis by holding out an ideal of personal wholeness and integration as the ultimate horizon of growth, while simultaneously recognizing that development and growth require time and sustained effort. The University seeks to encourage its constituent members to think creatively and to challenge the status quo when appropriate. Loyola also seeks to foster habits of learning, inquiry, and personal and corporate self-examination that encourage ongoing growth and change in its members.

Please provide specific examples of how Loyola's Institutional values were exhibited in the work setting. Discuss strengths and opportunities for improvement. The employee should provide a self-assessment, indicating how they have given expression to Loyola's mission through their work. [Please refer the Loyola Mission webpage for full definitions of the Values.](#)

Comments



## Job Duties

Please rate the employee's job responsibilities for the review period. These should include the major responsibilities from the employee's position description and may occasionally include other responsibilities.

### Manager

- Exceptional
- Exceeds Expectations
- Meets Expectations
- Below Expectations
- Needs Improvement

## Job Description Comments

Provide strengths and/or areas for improvement. Provide specific examples for a score graded above or below a "Meets Expectations" score. Include other comments as appropriate.

### Job Description Comments

**Self:** N/A

# Review Goals

Score:  / 5.0 (50%)

Goals/Performance Standards

**Results Achieved**

Score

Weight



Title:

/5.0

%

Rating:



Goals/Performance Standards

Results Achieved

Score

Weight



Delete

Title:

/5.0

%

Rating:

Add Past Goal





## Core Competencies

Select a rating for the performance level demonstrated by the employee during the review period for the following competencies.

Core Competencies	Employee Score:		Supervisor Score: <input type="text"/> / 5.0 (30%)			
	Rating					
Competency	5	4	3	2	1	N/A
<b>Self</b>						
<p><b>Cross-Cultural Sensitivity</b>            Demonstrates an awareness of, and sensitivity to, the needs and concerns of individuals from different cultures. Makes adjustments in communication style out of respect for cultural differences and minimizes the number of cross-cultural misunderstandings. This is quite different from those individuals who invest little or no time attempting to understand cultural differences and whose efforts to communicate across cultures often leads to misunderstandings.</p>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Self</b>						
<p><b>Productivity/Quality</b>            Has established a track record of producing work that is highly accurate, that meets or exceeds productivity standards that have been established</p>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



### Analytical Thinking

Breaks down problems and issues into sub-components and then assesses the costs, benefits and risks of various options prior to selecting a particular approach. This contrasts with the behavior of individuals who tend to attack problems without a thorough examination of all important components and ramifications; who fail to weigh the costs, benefits and risks associated with various alternatives; and/or who are unable to explain or justify their decisions in a logical and systematic fashion.

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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## Competencies Comments

Provide comments about strengths and/or areas for improvement. Provide specific examples for all competencies graded above or below a "Meets Expectations" score. Include other comments as appropriate.

### Competencies Comments

Self: N/A



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## New Strategic and/or Operational Goals

Identify a minimum of two new goals. These goals must be those the employee agreed to accomplish over the coming year.

Goals are specific assignments to participate in or manage ongoing or future projects. When setting project oriented goals, outline the scope of the role the employee is to play, lists resources and completion time frame and define the desired result.

Enter additional goals by clicking on the "Add New" button.

Goals	Weight
	
Self: N/A	
Title:	<input type="text"/> %
<input type="text"/>	
	
Self: N/A	
Title:	<input type="text"/> %
<input type="text"/>	



**Overall Score** Score:  / 5.0 (100%)

The level of overall performance.

**Comments**

This section is for optional employee comments.

**Supervisor Overall Comments:**



**Employee Overall Comments:**





# Finalizing Your Self-Evaluation:

Complete your self-appraisal

Help 

Jason Employee

Supervisor Training :  
By Jason Employee

Form Navigator

Annual Performance Evaluation Form  
Procedures

General Job Description

Performance Levels

KNOWLEDGE OF JOB

Uses equipment/tools/machiner

Applies knowledge of trade tech

Determines the procedures req

PRODUCTIVITY/QUALITY

Completes assigned tasks in a t

Organizes assignments well

Makes effective use of time and

Has necessary tools and supplie

Completes assignments to depa

DEPENDABILITY

Meets attendance standards

Meets punctuality standards

Complies with departmental/Uni

INITIATIVE

Suggests ways to improve oper

Willingly accepts new assignme

Adapts to changes in procedure

Reports problems and special c

Takes action in the absence of c

SAFETY

Complies with department/Unive

Is concerned with the safety of s

Wears appropriate attire for wor

INTERPERSONAL SKILLS

Cooperates with others to achie

Interacts with others with tact ar


Accepts constructive criticism ar

Demonstrates commitment to Lo

Equipment and Supplies

Properly cares for and maintains



 Completed



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## Annual Performance Evaluation Form

Employee Name: Jason Employee

Title: Account Executive

Department: Sales

Supervisor: James Manager

*This evaluation covers the period of April 1st of the previous year to March 31st of the current year.*

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### Procedures

1. The employee completes a self-evaluation (unless that requirement is waived by the supervisor).
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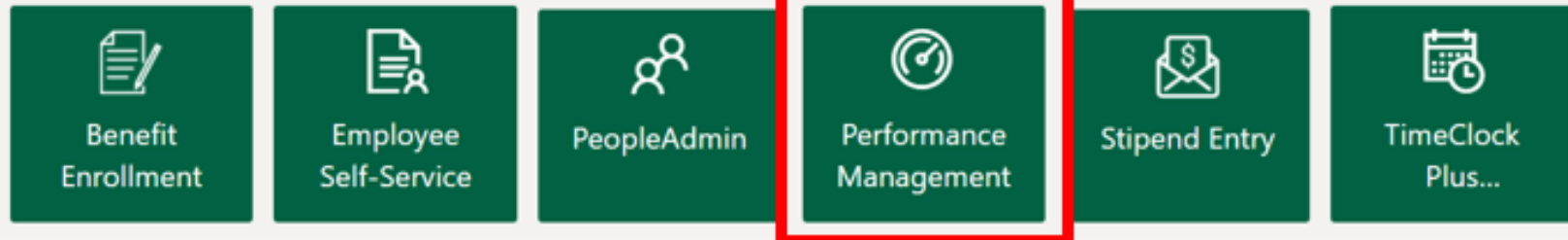
# Meeting with Your Supervisor

- Be sure to limit interruptions and silence cell phones
- Do not discuss other employee's performance, this is about you.
- Accept constructive feedback
- Jointly determine an action plan to reach your goals
- Summarize core points
- It is your Supervisor's job to give you honest feedback on your job performance.

# Signing off on your evaluation

- Inside Loyola Homepage
- Click Performance Management under Resources for Employees

## Resources for Employees



# Signing Off on the Evaluation:

Tasks (1) | All Tasks

Due in 3 days

Employee signature

Not ready

Share

Do you have feedback to share?

Learning +

Enroll in learning

You are not enrolled in any learning activities.

Learn more

My Learning

Goals +

Create a new goal

You don't have any goals right now

Learn more

All Goals

Connections

Find colleagues in your organization

My Team (1)

JM

James Manager

Development Plans +

You don't have any development plans right now

Bookmarks

Human Resources Website



# Signing Off on the Evaluation:

Complete your self-appraisal

John Employee

Supervisor Training -----  
By John Employee

Form Navigator

Annual Performance Evaluation Form  
Procedures  
DEFINITION OF RATINGS  
Goal Achievement  
Core Competencies  
Core Competencies  
Job Skills  
Quality of Work  
Productivity  
Dependability  
Relationship Building / Networking  
Communication  
Customer Focus  
Initiative  
Analytical Thinking  
Integrity  
Cross-Cultural Sensitivity  
Overall Score  
New Goals  
Comments

Help [X]

Save Complete

Comments

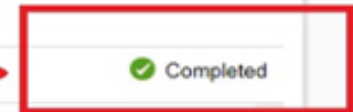
This section is for optional employee comments.

Supervisor Comments:

Employee Comments:



Print



### Form Navigator

- 202X-202X Annual Non-Supervisor Performance Evaluation
- Procedures
- DEFINITION OF RATINGS
- Loyola Mission, Vision, and Values
- Job Description
- Job Duties
- Job Description Comments
- Strategic and/or Operational Goals
- Core Competencies
- Core Competencies
  - Cross-Cultural Sensitivity
  - Productivity/Quality
  - Dependability
  - Relationship Building / Customer Focus
  - Communication
  - Initiative
  - Analytical Thinking
- Competencies Comments
- New Strategic and/or Operational Goals
- Professional/Service Development Plan
- Overall Score
- Comments

## Annual Non-Supervisor Performance Evaluation Form

Employee Name:

Title:

Department:

Supervisor:

*This evaluation covers the period of March 1st of the previous year to February 29th of the current year.*

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# Questions?

- More information can be found on the Human Resources website, under Compensation – Performance Management
- <https://www.loyola.edu/departments/hr/compensation/performance>
- Contact your HR Partner directly or the HR Office at extension 2354