# **Performance Excellence Phased Roll Out – Supervisor Guide**

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| **The supervisor and the employee are to take the required training no later than February 29, 2016.** |
| <https://elevateu.skillport.com/skillportfe/main.action#browse/66f8108f-5323-4835-bab3-fb49900d2a73>Instructions to get to the training:* Log in to Elevate U
* Click on MSU Performance Excellence Supervisor Course if you are the supervisor (support or academic)
* Click on MSU Performance Excellence Employee Course if you are a support staff employee. If you are a support staff supervisor you also take the Employee Excellence course.
* In Setting Goals, click Launch and it starts the training
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| **If your employee’s Performance Review is due *prior to* July 1, 2016:** |
| **1.Conduct the employee’s evaluation as near the evaluation due date as possible utilizing the form at this link:**<https://www.hr.msu.edu/performanceexcellence/MSU_AR_Form.pdf> * If the evaluation is for a probationary or interim employee, use the form at this link:

<https://www.hr.msu.edu/PerformanceExcellence/Probationary_Form.pdf> 2. In the same session or within 30 days of the evaluation, develop a Performance Plan for the next year utilizing the form at the following link:<https://www.hr.msu.edu/PerformanceExcellence/MSU_PP_Form.pdf> 3. Provide feedback, coaching and development opportunities to your employee throughout the year |
| *For the next Annual Review, (post June 30, 2016) use the new form and the new 4 tier rating system. See section below for details. If you are conducting the evaluation after July 1, 2016 for an evaluation due prior to July 1, use the forms above* |

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| **If your employee’s Performance Review is due on or *after*** **July 1, 2016** |
| 1. The supervisor and employee are to schedule a Performance Planning meeting as soon as possible, but no later than **March 31, 2016,** to establish a development plan and goals for the next evaluation.

<https://www.hr.msu.edu/PerformanceExcellence/MSU_PP_Form.pdf> Once the performance planning form is completed an signed by the supervisor and employee, scan and send to SolutionsCenter@hr.msu.edu1. The goal setting detailed form may be utilized for discussion between the supervisor and employee. It may be completed or you may utilize another format of your own. The goal planning documents are kept by the supervisor and employee and are not sent to Human Resources. You may use the goal setting form at the following link:

<https://www.hr.msu.edu/PerformanceExcellence/Goal_setting_and_development_plan.pdf>   |
| Provide feedback, coaching and development opportunities to your employee throughout the year |

*When the Performance Review discussion is completed, provide a copy of signed documents to the employee and retain a copy of the documents in the department. Supervisor or unit designee: can and email signed Annual Review forms and performance planning forms to:* *SolutionsCenter@hr.msu.edu*

Performance Excellence

1. Probationary and interim evaluations:

<https://www.hr.msu.edu/performanceexcellence/Probationary_Form.pdf>

**Interim Determination box:** Only used for midpoint (6 month) review for salaried employees

Administrative Professional and Administrative Professional Supervsiors

**Probationary Determination box:**

* Use for AP and APS individuals that have completed one year
* Use for CT individuals that have 1040 working hours for full time; for three quarter time completed 780 hours and for half time completed 520 working hours. (use of vacation, personal and sick leave are not counted as working hours)
* Use for service maintenance (1585) and skilled trades (999) that have completed six months of work and 1040 hours for full time and 520 for part time.
1. Definition of employment status
* full time: appointed 90-100% (36-40 hours per week) for 9 months or more
* three quarter time: appointed 65%-89.9% (26 but less than 36 hours per week) for 9 month or more
* half time: appointed 50%-64.9% (20 hours but less than 26 hours per week) for 9 months or more
1. If someone is reclassified (entered in to the classification through reclassification rather than applying and being selected) they do not serve a probationary, trial or evaluation period.
2. If an individual is to receive “does not meet expectations”, contact Kris Hynes at hynes@msu.edu or 517.432.7102 to discuss in advance.

If a “does not meet expectations” rating is provided, a Performance Improvement Plan is to be developed immediately. A discussion between the supervisor and employee must occur within 30 and 60 days. Approximately 3 weeks prior to the 90 days after the PIP was established, contact Kris Hynes to review prior to meeting with the employee.

The Performance Improvement plan form link:

<https://www.hr.msu.edu/PerformanceExcellence/MSU_HR_PIP%20Forms.pdf>

* (use only for those given a “no” under Overall Performance Level (which means “does not meet expectations)
1. Prior to meeting with an employee for their evaluation and planning, gather the following information:
* Copy of most recent performance evaluation
* Copy of goals (performance planning document prepared for this time period)
* Job description (if one has not been developed, you could start developing and complete after discussion with employee
* Ask employee to complete self-review document and provide to you a few weeks in advance of evaluation discussion (optional) <https://www.hr.msu.edu/PerformanceExcellence/Self-review_worksheet.pdf> (if used, this is not sent to Human Resources. It is kept by supervisor and employee)
1. Additional Tools for employees and supervisors
* Employee Tools link:

<https://www.hr.msu.edu/performanceexcellence/tools-staff.html>

* Supervisor Tools link:

<https://www.hr.msu.edu/performanceexcellence/tools-supervisor.html>