NOVA SOUTHEASTERN UNIVERSITY
Shark Performance Management Program
GOALS • VALUES • RECOGNITION

FAQs on NSU's Annual Performance Review Process

This information is about the Performance Review process for those employees evaluated in the Shark Talent Management system.

Who is evaluated using the system?
- Full-time and part-time regular employees.
- **Academic Administrators with faculty rank**. (typically coded in Banner as 51% or more 1020). These individuals will not appear on the faculty reappointment list that you receive from OHR.
- Mailman Segal Center and NSU University School 10-Month and 11-Month employees are on a separate performance review timeline.

Who is not evaluated using the system?
- Full-time and part-time faculty (coded in Banner as 51% or more 1019). The faculty review process remains a separate process.
- Student employees
- Temporary employees
- Adjunct employees
- The Provost has a separate review process for Deans.
- Information and User Guides can be found on the Performance webpage at http://www.nova.edu/hr/performance/index.html

Who should enter goals?
All employees should enter their performance goals in the Shark Talent Management System. See the **SMART Goals Worksheet with Examples** in the section **General User Instructions Guides** for more information.

- Exempt employees are responsible to work with their Immediate Supervisor to create independent goals.
- Nonexempt employees have task goals related to their specific jobs, but nonexempt employees may also work with their Immediate Supervisors to create independent goals. Task goals are based upon the essential job functions listed in each non-exempt employee's job description.

- Nonexempt employees should advance their task goals from last year to this year. See the instructions **How to Carry Forward Task Goals for Non-Exempt Employees** in the section **General User Instructions Guides** for more information.
- Supervisors are assigned a **People Manager Goal** annually.
- Supervisors should **approve** their employees' goals before June 30th. Any goal that is not approved before June 30th will not be included in a performance review.
- If a goal was previously approved, then subsequently edited, the edited goal must be re-approved, or else only the previously approved version of the goal will appear in the review.

What responsibilities do faculty members who are not Academic Administrators have in the Shark Performance Management system?

Faculty members with no administrative appointment and **who DO NOT supervise anyone have no responsibilities in the system**. These faculty members will be reviewed using their college's faculty reappointment process.

Faulty members who supervise non-faculty employees are responsible for completing the immediate supervisor review for their non-faculty direct reports. These faculty members will not be reviewed in the system; rather they will be reviewed using their college's faculty reappointment process.

Are annual performance reviews completed for employees who are terminating?

If a review launches for an employee who is terminating, it is recommended that the annual evaluation be completed to document performance.

What happens if an Immediate Supervisor position is vacant? Who completes reviews for the vacant immediate supervisor's staff?

If an employee with the role of Immediate Supervisor in Shark Talent, subsequently terminates, the individuals who reported to the terminated Immediate Supervisor will automatically roll up to the Next Level Manager (who becomes the Immediate Supervisor in Shark Talent) until either the vacant position is filled or the employees who report to the vacant position are changed in Banner.

What does the employee see during each step of the review process?

The employee can see only his self-evaluation comments and scores until the Immediate Supervisor signs off at Step 3. Only after the Immediate Supervisor signs off at Step 3, all comments and scores will be visible to the employee. If Step 3 is not completed and the review moves to Step 4, the employee will not see Supervisor comments and scores.

The review can be re-opened to any previous step, and can be updated, PRIOR to the Immediate Supervisor sign-off. Once the Immediate Supervisor signs off on the review, the employee will be able to see all comments.

If you are a new supervisor for an existing employee, you will need to contact the old supervisor for feedback and assign the old supervisor the status of CO-PLANNER in the Shark Talent Management system so she or he can add their feedback on the employee's performance. See the instructions **How to Add a Co-Planner** in the section **General User Instructions Guide**s for more information.

What do I do if an employee wants to write a comment on the performance review form?
The employee can write a comment in their self-review section <u>during the performance review cycle and before the supervisor signs off on the review</u>.

If an employee would like to comment on the review following the review discussion with the supervisor, the supervisor should request to reopen the evaluation to the employee <u>before the supervisor signs off</u>.

What about employees on leave?
When an employee returns from leave, the employee should work with the HR Contact to notify the HR Strategic Business Partner to reopen the review form to complete the evaluation.

How is employee who is a new hire or rehire in the middle of a performance cycle be evaluated?
Within 90 days of hire into a position, an employee's expectations should be outlined and goals developed.

Non-faculty employees hired prior to March 1: following the first 90 days of employment the employee will receive a 90-Day Orientation Review, and in July of that year, the employee will receive an annual review.

Non-faculty employees hired on or after March 1: following the first 90 days of employment the employee will receive a 90-Day Orientation Review, and in July of the following year, the employee will receive an annual review.

Non-faculty employees who change jobs internally during the year: following the first 90 days of employment in the new position, the employee will receive a 90-Day Orientation Review, and in July of that year, the employee will receive an annual review covering both the prior position and the current position.

Who conducts the annual review if an employee has changed positions or changed supervisors during the fiscal year (July 1 to June 30)?
Once the performance review schedule reaches July 1 on the timeline, the <u>new supervisor will conduct the review</u> obtaining feedback <u>from the previous supervisor</u>.

If the previous supervisor is no longer with the University, the current supervisor should consult with other supervisory staff that have worked closely with the employee to assist in filling out the evaluation.

<u>The new supervisor will need to assign the old supervisor as a Co-Planner in Shark Talent</u>. See the instructions **How to Add a Co-Planner** for more information on the Co-Planner functionality.

Who approves the review once I complete it?
If an employee receives an overall score of unsatisfactory contribution or exceptional contribution, best practice should be that your next level supervisor would review and agree to the scoring.

NOTE: If you would like the next level supervisor to review a specific employee review, you must use the Co-Planner feature.

What is the performance rating scale?

There are three possible ratings for each goal or task goal. These are outlined below:

Rating	Performance Description
Exceptional Contribution	**Frequently exceeded expectations.** Employee was an exceptional contributor to the success of his/her department and NSU. He/she demonstrated role model behaviors.
Successful Contribution	Consistently **met expectations and may occasionally exceed expectations.** Employee was a solid contributor to the success of his/her department and NSU.
Unsatisfactory Contribution	Delivers **inconsistent contributions.** Improvement is needed to accomplish expected results. If the overall performance rating is Unsatisfactory Contribution, the employee should be placed on a Performance Improvement Plan with a follow-up review occurring as specified by the supervisor.

How are weightings and ratings related?

There are two sections to the new performance review that will comprise the Overall Score of each employee's review:

Section 1, Goals & Responsibilities	2 parts: Part A) however many goals that were created and approved for the current review period; Managers will be also assigned a separate People Manager goal; Part B) one question regarding the Immediate Supervisor's overall assessment of the employee's behaviors and responsibilities	Part A is 50% of the Section Score Part B is 50% of the Section Score	Section Score comprises 75% of Overall Review Score
Section 2, Core Values	1 part: 8 specific NSU Core Values		Section Score comprises 25% of Overall Review Score

Section 1, Part A has rating and weighting.

- Rating allows the Immediate Supervisor to rate the Employee's progress for completion of the goal for the performance period.
- Weighting allow the Immediate Supervisor to place greater value on one goal over another goal.
- The weight of all goals must add up to 100%.

Section 1, Part B has rating only.

- Rating allows the Immediate Supervisor to rate the Employee's behaviors and responsibilities for the performance period.

Section 2 has rating only. Each Core Value holds the same weight as the other 7 Core Values.

- Rating allows the Immediate Supervisor to rate the Employee's demonstration of NSU's Core Values for the performance period.