FREQUENTLY ASKED QUESTIONS

1) Why the change?
2) What are the differences and similarities with the new form?
3) What is a competency and how do I evaluate it?
4) What happened to the goals section?
5) Why don’t we have employees self-evaluate?
6) Should a performance meeting be held?
7) How do I create a development plan for my staff?
8) What is the process and timeline?
9) Do I have to follow the calendar?
10) How does the form work?
11) Can I insert a copy of my signature on the form?
12) What resources are available during the performance appraisal process?
1) **Why the change?**

There are two goals the University hopes to achieve with this change. The first is to make the process more efficient; the second is to make the review more effective and useful.

To be more efficient, the deadlines have been moved up to ease the stress of multiple priorities occurring at the same time in the calendar year. In addition, the new process will cut down significantly on paper and time. This is good for the environment and the bottom line.

Increased effectiveness results from adding the leadership competency assessment to the review form. It is common practice for leading universities to use competencies in their performance management systems. Assessing the behaviors and knowledge competencies that leaders of Montclair State University should possess will promote our growth and successes.

2) **What are the differences with the new form?**

The managerial performance evaluation and reappointment form has a new look!

- You will now formally rate your managerial staff on a set of competencies instead of goals. Leaders who rank high on competencies will commonly attain goals.
- Managers will no longer evaluate themselves, first, as a part of the review process. Instead, managers will have the option to add comments after they meet with their immediate supervisor.
- The form is to be completed on a computer or Microsoft Word compatible tablets. Boxes will expand as you type.
- You will not be printing and signing the document by hand, instead, it will be typed as an electronic signature and emailed throughout the process. No other documentation is needed beyond the form.

There are a few similarities to the previous form. For example, there is still a general summary where you can comment freely about the manager’s performance.

3) **What is a competency and how do I evaluate it?**

A competency is the specific behavior, knowledge, and motivation that an employee must demonstrate in order to be effective in a given job or role. We have three levels of capability: high performing, meets expectations and needs improvement. Utilize the *Managerial Competency Guide* to attain a clearer understanding of the competencies to assist you as you complete the form.

As you decide a capability level for each competency, you should be able to cite specific examples of behaviors that justify your ranking of the competency. You can use the narrative box to share a few examples of the behaviors you observe on a regular basis. You do not have to put an example for every competency unless you choose to do so. Remember, be objective and watch for any positive or negative biases that you may have.
4) **What happened to the goals section?**
At this time, formal goal review has been removed from the form in order to increase our focus on competency review and manager development in those competency areas. You can still identify goals and goal achievement status in the narrative but be sure that you are specifically commenting on goal status and not on task achievement.

Best practice for goals: Select no more than three to comment on at a time. It may be better to focus on effort as there may be variables to goal achievement that are outside a manager’s control.

5) **Why don’t we have employees self-evaluate?**
At this time, employees do not have to formally self-evaluate prior to the review. They will have the option and opportunity to comment after the review.

6) **Should a performance meeting be held?**
It’s a good practice to meet annually. If you are giving feedback on a regular basis, this will not be difficult and shouldn’t take long. Use this time to discuss strengths and development ideas. Try using **coaching techniques** for a collaborative meeting. The more your employees feel like they are part of the process, the more motivated they will be towards their growth and development.

It is recommended that you have a discussion about the guide and new appraisal form with your direct reports prior to assessment. You can always have the employee self-evaluate themselves, informally.

It is important that your **appraisal not be a surprise**. It is a good practice to provide regular feedback so employees will know where they stand.

This should be a positive and supportive experience for you and your direct reports. Remember to use your coaching skills!

7) **How do I create a development plan for my staff?**
On the HR website there is a form you can use to help create a development strategy. There is also an example for you to review. The best approach is to work with your direct reports in coming up with the best plan of action. If your direct reports are not involved in the planning, they may be less motivated in completing any actions.

Once you have identified development ideas, you can place a sample in the narrative section if you choose. Do not attach the document to the form or email it with the evaluation form.

If you’d like assistance, you are encouraged to seek out the Office of Organizational Development and Training staff.
8) **What is the process and timeline?**

The process begins with the reviewer. The review period is earlier and the form is emailed instead of printed. Please refer to the calendar on our website. There you will see the process and deadlines in detail.

9) **Do I have to follow the calendar?**

There is flexibility in the month of January. This is especially important for those with many reviews to conduct. On the calendar numbers one through four are suggested dates to help you with time management. The hard dates are:

- You should begin your review(s) in January
- Immediate supervisors must submit to unit heads on date indicated in the calendar
- All dates following the “unit head” must be adhered to

10) **How does the form work?**

- When you open the form in Microsoft Word you can easily fill in the necessary fields by clicking in the desired area or box
- For “Meets Expectations” etc. rating selection, simply click the drop down box
- Where the form says “Electronic Signature,” you only need to type in your name
- The box for narrative comments expands automatically
- Type in extra return spaces to keep tables from breaking across pages
- Save to your files
- Email the document to the appropriate person as described in the calendar

11) **Can I insert a copy of my signature on the form?**

Unfortunately, not at this time. This form can’t except .jpegs or .pdfs.

12) **What resources are available during the performance appraisal process?**

The Division of Human Resources and Office of Organization Development and Training are available for you:

- For questions on the process and timelines, please contact Jim Lopes, Senior HR Generalist, via email or at ext. 3237
- For help with the form, content or some coaching on conducting development meetings, please call Lorin Mask at ext 2045 or send an email.