

**Process to Complete the Performance Assessment Template:**

* **Performance Assessment Window: July 1 – August 31, 2020**. All final copies should be in Human Resources by August 31, 2020.
* The supervisor sets up a Zoom performance assessment conversation. The meeting should be held about 10 days after the supervisor sends the employee the performance assessment template.
* The staff member completes the performance assessment template. They complete:
* The data section at the top of the template, including an employee identification #.
* The employee also includes comments in the
* Competency Evaluation, Annual Overview Comments section
* Goal Accomplishment section
* Goal Setting section
* Once the employee completes the template, saves a copy and sends an electronic copy to their supervisor’s email address at least 2 - 3 days before the performance assessment conversation is scheduled.
* The supervisor reviews and includes comments in the performance assessment template prior to the conversation.
* During the conversation, the supervisor shares the updated copy and discusses the comments. The supervisor provides time for the employee’s to share feedback and ask questions.
* Once the employee and supervisor have discussed the assessment, they both sign it. The supervisor then makes a PDF copy and sends it to the employee and the Department Head and/or Vice President. The supervisor keeps a copy, too.
* The Department Head or Vice President **sends a final signed copy to Human Resources at** humanresources@swarthmore.edu for placement in the personnel file
* It is encouraged that the supervisor establishes regular check ins, consistent follow up on goals and establish professional development opportunities with the staff member.

**Staff member and Supervisor Expectations**

The assessment template is a tool to help the supervisor and the staff member think about the performance of the job and to assess if the performance outcomes met the expectations and goals that were established. The staff member should complete their assessment section evaluating their own performance and provide the supervisor with an electronic copy. The supervisor and staff member must meet and discuss the assessment before it is finalized. Staff and supervisors are encouraged to keep the written documentation as concise as possible. Using bullet points rather than complete sentences to list accomplishments is acceptable provided every bullet is in the form of an achievable action.

During the meeting, the staff member and supervisor discuss the overall performance assessment. The assessment should be based on observed or verified performance. The aim of the feedback conversation is to have an open and constructive discussion that leads to an understanding of how well the staff member met expectations throughout the performance period.

**Remember:**

The performance appraisal is designed to summarize and assess performance over the past performance year, which for us was approximately July 2019 to June 2020. That means approximately two thirds of the review year took place before COVID-19 and the shift to work-from-home, and approximately one third took place during COVID-19. A method is to consider goals, responsibilities, values, and behaviors for the time before COVID and during COVID as two distinct parts of the year. Staff will complete the assessment first and submit it to their supervisor to include additional comments and feedback. The staff member and supervisor should document each part of the year and establish goals for the next year.

**Tip:**

* How to scan a document on your iPhone: <https://support.apple.com/en-us/HT210336>
* How to scan a document using an Android: <https://www.youtube.com/watch?v=DgA1-MBTMKg>

*once scanned, the document can be sent to an email account*