



## Performance Assessment Process Instructions

Staff members should complete the Performance Assessment Template for Employees and share it with their supervisor. The supervisor will complete the Performance Assessment Template for Supervisors and a meeting will be scheduled by the supervisor to discuss the documents and finalize the setting of SMART goals for the upcoming year.

The performance assessment templates are designed to assist the supervisor and the staff member as they think about the staff member's recent job performance and determine if they are meeting the expectations and goals that were established in the previous year. This is also an opportunity to discuss what supervisory support is currently being provided and if any modifications may need to be made, and discuss professional development and overall career goals and upcoming departmental initiatives.

The aim of this 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. During the conversation, the staff member and supervisor should discuss overall job performance as well as the performance assessment.

### Performance Assessment Timelines

- **Fiscal Year Cycle for 2022**– Reviews are due by August 15, 2022, for the period from July 1, 2021 - June 30, 2022
- **Calendar Year Cycle for 2022**– Reviews are due by February 15, 2023, for the period from January 1, 2022 - December 31, 2022

### Steps to Completing the Performance Assessment Process

- The supervisor sets up the performance assessment conversation.
- The staff member completes the Performance Assessment Template for Employees, including the following sections:
  - Summary of the previous year
  - Professional development and career planning
  - Supervisory support
  - Additional comments

- Their SMART (**S**pecific, **M**easurable, **A**ttainable, **R**elevant, **T**imebound) goals
- The staff member shares the completed Performance Assessment Template for Employees with their supervisor.
- The supervisor reviews the employee's performance assessment and completes the Performance Assessment Template for Supervisors.
- A meeting is set to discuss the assessment documents and to finalize the SMART Goals for the upcoming year.
- Once the staff member and supervisor have discussed the supervisor's performance assessment, they both sign it. The finalized assessment form should be sent to [talent@swarthmore.edu](mailto:talent@swarthmore.edu).
  - **Please be sure use the following naming convention for the final performance assessment document you submit:** Staff Members ID#\_Last Name\_First Name\_Year. For example 999999999\_Doe\_Jane\_2022.

Beyond the formal assessment process, supervisors are encouraged to establish regular check-ins, consistently follow up on the staff member's goals, and establish professional development opportunities with the staff member.