

GUIDELINES FOR EXECUTING PERFORMANCE REVIEWS FOR STAFF MEMBERS

Chairs and program directors are obligated to complete yearly performance reviews for their administrative assistants (and any staff members who report to them directly); the annual due date is May 31st. The HR website provides an overview of the standard Annual Performance Review process and offers helpful resources, although CPDs may deviate somewhat from the HR guidelines in the specific ways outlined below.

Because most AAs in Academic Affairs cover more than one department or program, they have more than one supervisor. Ideally, the supervisors will confer and one individual will take the lead in collating the supervisors' perspectives; engaging in the performance conversation with the AA; and writing and submitting the final document(s), to be signed by all supervisors. Alternatively, however, or if circumstances require it, each supervisor may undertake a separate review. Note that in all cases, HR's template/form for the annual performance review is required.

The general steps in the process are as follows:

- The AA provides a self-evaluation ([Performance Review--Employee Version](#)) to the supervisor(s).
- The supervisor(s) provide(s) a draft of the performance review document ([Performance Review--Supervisor Version](#)) to the AA.
- Supervisor(s) and AA meet to discuss. The conversation should help refine the final performance review document, which may be amended as a result.

Once the performance review conversation has taken place and the AA and supervisor(s) have signed the final performance review document, it should be submitted to the ADOF for the 1-over-1 signature. (Electronic submission is acceptable.) The AA's self-evaluation should also be forwarded to the ADOF. The ADOF will read and sign the documents and forward them to HR.

There is no need to share with the ADOF an advance draft of the supervisor's performance review document *unless* the AA's performance rating is "Needs Development" or "Unacceptable." In that case, the ADOF will advise the supervisor(s) about how best to proceed. HR professionals are also available for consultation at any time in the process.

While we recognize that CPDs often have minimal supervisory experience and may initially be uncomfortable reviewing an employee, it may help to remember that a performance review enables the following:

- Reaffirms a staff member's status as both a professional and a team member whose work is taken seriously.
- Offers an opportunity to praise those aspects of the job that are done well, and to share that praise with the Dean's Office and HR.
- Provides a written map for the future. Expectations are clearly documented, allowing the staff member to improve and/or pivot as required.