



UNIVERSITY *of*
WEST FLORIDA

**President, Vice President, Provost, and General
Counsel's Direct Reports' Performance Memo
Instructions**

PageUp Performance Management

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Policy

UWF shall utilize employee evaluation programs to acknowledge performance; to communicate performance effectiveness; to aid in improving performance in assigned duties; and when necessary, to develop a performance plan to assist in correcting deficiencies. The evaluation program may also be used to identify recipients of financial rewards when designated by the President.

<https://confluence.uwf.edu/x/AoOoAg>

Presidential, Vice-Presidential, or General Counsel Direct Report Evaluation

Personnel positions reporting to the President, Vice President, Provost, or General Counsel shall have their performance reviewed periodically, which is defined as at least annually. The President, Vice President, Provost, or General Counsel will request that each direct report complete a self-evaluation of the progress of their previous objectives and submit the evaluation to the President, Vice President, Provost, or General Counsel. The self-evaluation should also include suggested objectives for the upcoming reporting period. The President, Vice President, Provost, or General Counsel will review the self-evaluation and suggested objectives, provide a written evaluative response, and meet with the incumbent for discussion. The self-evaluation, letter of evaluation, and finalized objectives will be provided to Human Resources for placement in Banner and the employment file.

Presidential, Vice-Presidential, Provost, or General Counsel Direct Report Evaluation

- Employees shall be evaluated annually, July 1 to June 30, by their immediate supervisors.
 - Employees shall be evaluated annually in July by their immediate supervisor. All annual evaluations are due on September 30th. Any rating below Satisfactory must be handled as a Special Performance.
 - Failure to complete an annual evaluation on the employee by October 31st shall result in the employee automatically receiving a rating at the same level as the most recent completed evaluation, if the supervisor has not requested an extension.
 - Employees who are evaluated but have not acknowledged their annual evaluation by October 31st shall automatically receive the rating assigned by the supervisor, and the evaluation will be moved to a status of complete by Human Resources.
 - If the supervisor during the annual evaluation period is no longer with the University, the employee shall automatically receive a rating at the same level as the most recent completed evaluation.
 - If the employee is supervised by multiple supervisors during the annual evaluation period, the supervisors should collaborate on the completion of the employee's annual performance evaluation.
 - Performance Standards Ratings shall be defined as follows for the University Work Force employees:
 - Superior
 - Above
 - Satisfactory
 - Needs Improvement
 - Below
 - Employees rated at **Below** or **Needs Improvement** shall be subject to a Special Evaluation and Improvement Plan as outline in Section (2) (c) of the HR-17.04-06/20 policy.

Non-Supervisor Standard Evaluation Competencies

- **Knowledge, Skills and Abilities** - Employee has the knowledge, skills, and abilities needed in the present position.
 - **Quality/Quantity of work** - Employee has the ability to independently plan, prioritize, and complete work with accuracy, neatness, and at a satisfactory rate.
 - **Customer Service Skills** - Employee is committed to providing excellent customer service to internal and external customers and willingly cooperates with others to achieve department and University goals. Demonstrates a positive attitude toward others; and exhibits flexibility and adaptability in meeting the demands of change in the work-place.
 - **Attendance** - Employee is punctual, adheres to work schedule and complies with attendance and leave policies.
 - **Initiative** - Employee exhibits leadership, is resourceful and willing to do more than the minimum, strives to achieve goals, and seeks additional responsibility. Include in this rating (if applicable), the employee's performance, supervision, updating job questionnaires, completing performance evaluations, and setting standards, goals, and objectives.
-

Supervisor Standard Evaluation Competencies

- **Knowledge, Skills and Abilities** - Employee has the knowledge, skills, and abilities needed in the present position.
- **Quality/Quantity of work** - Employee has the ability to independently plan, prioritize, and complete work with accuracy, neatness, and at a satisfactory rate.
- **Customer Service Skills** - Employee is committed to providing excellent customer service to internal and external customers and willingly cooperates with others to achieve department and University goals. Employee demonstrates a positive attitude toward others; and exhibits flexibility and adaptability in meeting the demands of change in the work-place.
- **Attendance** - Employee is punctual, adheres to work schedule, and complies with attendance and leave policies.
- **Initiative** - Employee exhibits leadership, is resourceful and willing to do more than the minimum, strives to achieve goals, and seeks additional responsibility.
- **Integrity** – Employee projects a positive image as a leader within the University; promotes, enforces, and takes action consistent with the current policies and procedures; takes responsibility for personal actions; keeps commitments; and displays strong moral principles. Employee leads by example, does the right thing when no one is looking, and is able to be trusted consistently.
- **Communication** – Employee clearly and effectively conveys information that expresses thoughts, facts, and the University’s mission; demonstrates effective use of listening skills; encourages and supports openness to other peoples’ ideas and thoughts; and ensures important matters are shared with all appropriate parties.
- **Collaboration** - Employee shares time, energy, knowledge and skills with others for the betterment of the University; offers assistance and support when needed; creates an atmosphere where employees feel empowered to perform their duties with decision-making authority within their areas of responsibility; works cooperatively and effectively with others to achieve common goals; and resolves interpersonal conflicts constructively.
- **Performance Management** – Employee sets measurable objectives (quantitative and/or qualitative) for direct reports(s) aligned with the department’s (and University’s) strategic plan; provides regular feedback on performance as measured against goals; addresses performance issues promptly; fosters direct report’s learning and development opportunities; provides public and private recognition of accomplishments; and completes direct report’s performance review as assigned, including written feedback on competency scores above or below a rating of “3 Stars.

Performance Standard Rating Scale

- 1.0 to 1.4 - Below Performance
 - 1.5 to 2.4 - Needs Improvement Performance
 - 2.5 to 3.4 - Satisfactory Performance
 - 3.5 to 4.4 - Above Performance
 - 4.5 to 5.0 - Superior Performance
-

Standards of Performance

- **Superior** – Employee significantly exceeds position requirements.
 - **Above** – Employee consistently exceeds expectations and demonstrates ability to surpass position requirements.
 - **Satisfactory** – Employee meets all position requirements.
 - **Needs Improvement** – Employee is not satisfactorily completing the assigned duties. *Supervisors will be contacted by Human Resources upon submission of an employee evaluation with an overall rating of needs improvement.*
 - **Below** – Employee is not meeting standards, goals, or objectives set for the position. *Supervisors will be contacted by Human Resources upon submission of an employee evaluation with an overall rating of below.*
-

Annual Performance Evaluation Period

Annual evaluations are conducted at the end of each fiscal year. The evaluation period runs July 1 through June 30.

All steps in the performance review must be completed by September 30 of each year.

If a supervisor has not requested and been granted an extension, failure to complete an annual evaluation on an employee by October 31st shall result in the employee automatically receiving a rating at the same level as the most recent completed evaluation.

An employee who has been evaluated but has not acknowledged their annual evaluation by the due date, shall automatically receive the rating assigned by the supervisor, and the evaluation will be moved to a status of complete.

Per [HR 17.04-06/20 policy.](#)

Performance Evaluation Workflow

Supervisor Creates Objectives

After this step, the supervisor should conduct a meeting with the employee to review the current evaluation and next year's objectives.



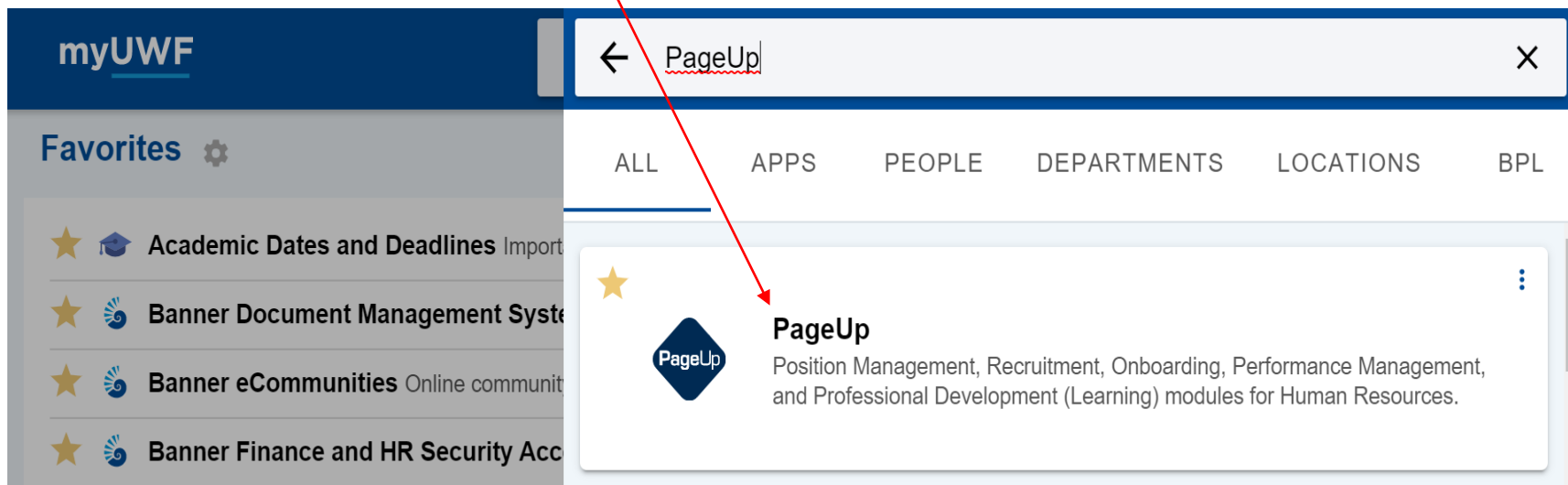
Supervisor Uploads the Memo and Rates the Employee



HR Review/Approves Evaluation

Logging into PageUp Performance Management

Log into MyUWF, search for PageUp, and click on the PageUp app.



The screenshot shows the myUWF search interface. On the left is a sidebar with the myUWF logo and a 'Favorites' section containing four items: Academic Dates and Deadlines, Banner Document Management System, Banner eCommunities, and Banner Finance and HR Security Account. The main area has a search bar at the top with a back arrow, the text 'PageUp', and a close 'X' button. Below the search bar are tabs for ALL, APPS, PEOPLE, DEPARTMENTS, LOCATIONS, and BPL. The 'APPS' tab is selected. A search result for 'PageUp' is displayed, featuring a yellow star icon, a blue diamond icon with the text 'PageUp', and a description: 'Position Management, Recruitment, Onboarding, Performance Management, and Professional Development (Learning) modules for Human Resources.' A red arrow points from the text 'click on the PageUp app' to the 'PageUp' app result.

myUWF

← PageUp X

ALL APPS PEOPLE DEPARTMENTS LOCATIONS BPL

★ Academic Dates and Deadlines Import

★ Banner Document Management System

★ Banner eCommunities Online community

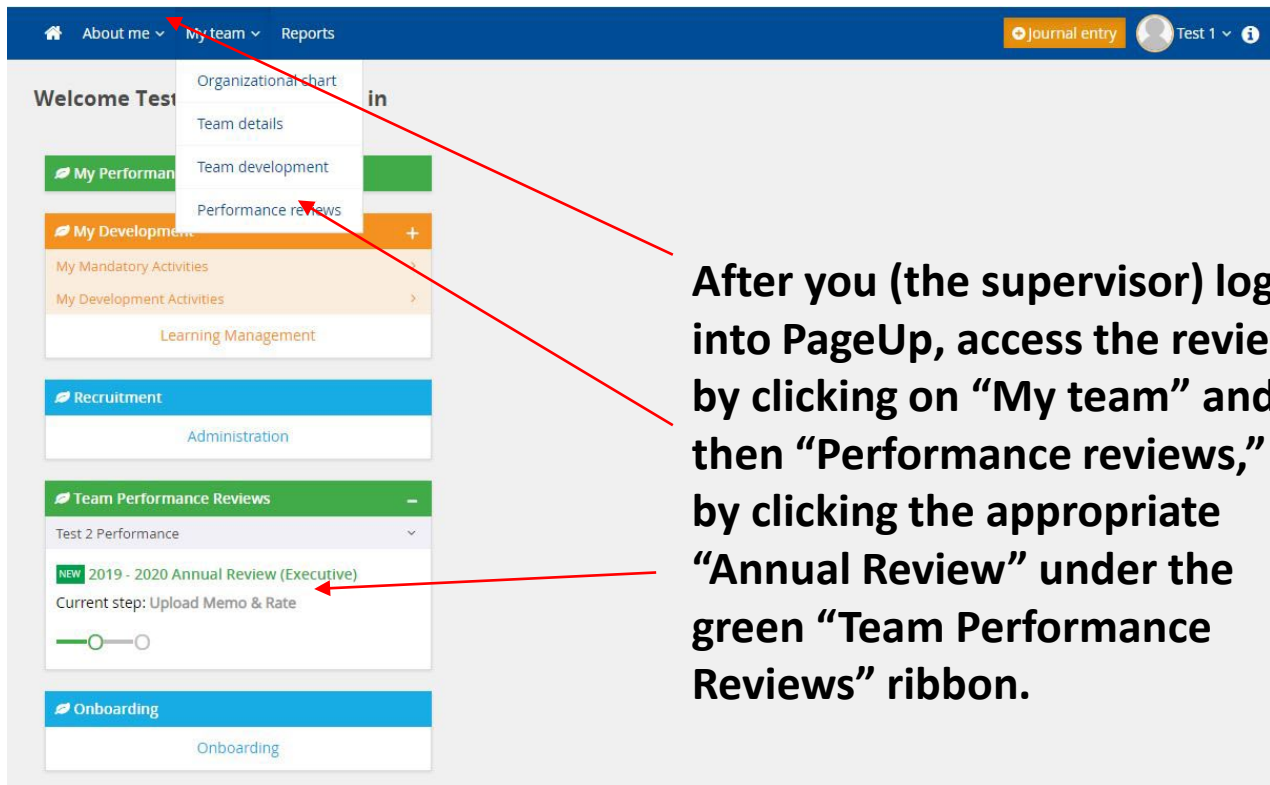
★ Banner Finance and HR Security Account

★

PageUp

Position Management, Recruitment, Onboarding, Performance Management, and Professional Development (Learning) modules for Human Resources.

Getting Started



The screenshot displays the PageUp system interface. At the top, a blue navigation bar contains links for 'About me', 'My team', and 'Reports'. A red arrow points from the 'My team' link to a dropdown menu. This menu includes options: 'Organizational chart', 'Team details', 'Team development', and 'Performance reviews'. Another red arrow points from 'Performance reviews' to the 'Team Performance Reviews' ribbon on the left sidebar. This ribbon is green and features a 'NEW' badge. Below the ribbon, it shows 'Test 2 Performance' with a dropdown arrow, and a specific review titled '2019 - 2020 Annual Review (Executive)'. A red arrow points to this review, which has a progress bar indicating the current step is 'Upload Memo & Rate'.

After you (the supervisor) log into PageUp, access the review by clicking on “My team” and then “Performance reviews,” or by clicking the appropriate “Annual Review” under the green “Team Performance Reviews” ribbon.

Getting Started

1. Search for the employee. Make sure to clear any previous searches.

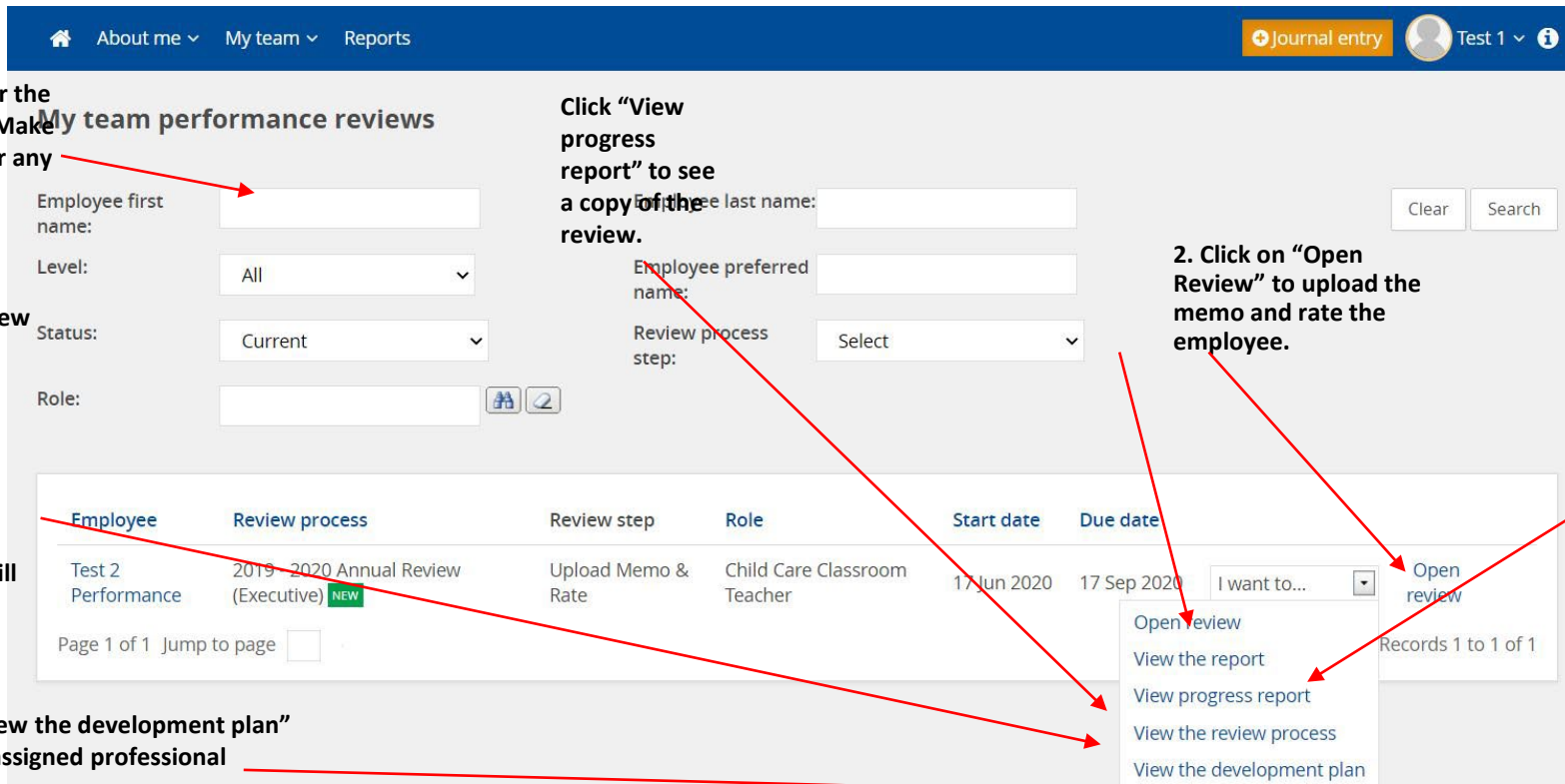
Click on "View the review process" to see which steps have been completed and which steps are still pending.

Click on "View the development plan" to see any assigned professional development.

Click "View progress report" to see a copy of the review.

2. Click on "Open Review" to upload the memo and rate the employee.

Click "View the report" to see a summary of the review.



The screenshot shows the 'My team performance reviews' page. At the top is a navigation bar with 'About me', 'My team', and 'Reports'. A 'Journal entry' button and a user profile 'Test 1' are on the right. The main section has search filters for Employee first name, Last name, Level (All), Status (Current), and Role. Below these is a table of reviews. The first row shows 'Test 2 Performance' for '2019 - 2020 Annual Review (Executive)' with a 'NEW' tag. The review step is 'Upload Memo & Rate' for a 'Child Care Classroom Teacher' from '17 Jun 2020' to '17 Sep 2020'. A dropdown menu 'I want to...' is open, showing options: 'Open review', 'View the report', 'View progress report', 'View the review process', and 'View the development plan'. Red arrows point from the instructions to the search filters, the 'View the review process' link, the 'View the development plan' link, the 'View progress report' link, the 'Open review' button, and the 'View the report' link.

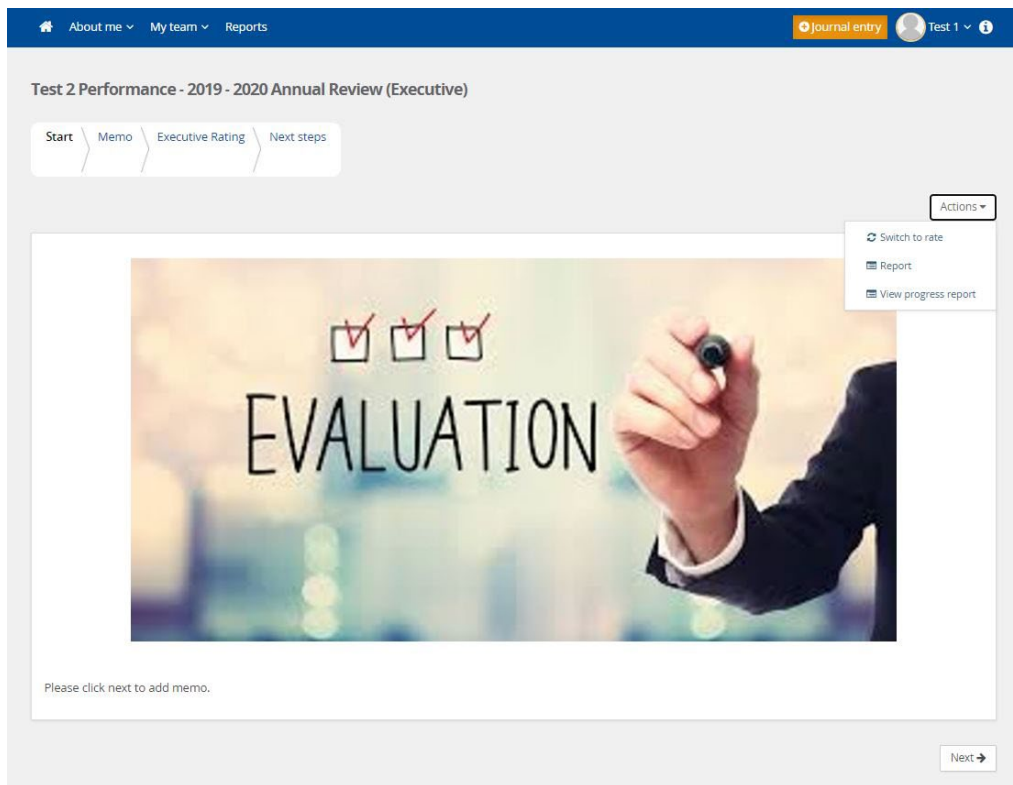
Employee	Review process	Review step	Role	Start date	Due date
Test 2 Performance	2019 - 2020 Annual Review (Executive) NEW	Upload Memo & Rate	Child Care Classroom Teacher	17 Jun 2020	17 Sep 2020

Page 1 of 1 Jump to page

I want to...
 Open review
 View the report
 View progress report
 View the review process
 View the development plan

Records 1 to 1 of 1

Getting Started



Test 2 Performance - 2019 - 2020 Annual Review (Executive)

Start Memo Executive Rating Next steps

EVALUATION

Please click next to add memo.

Next →

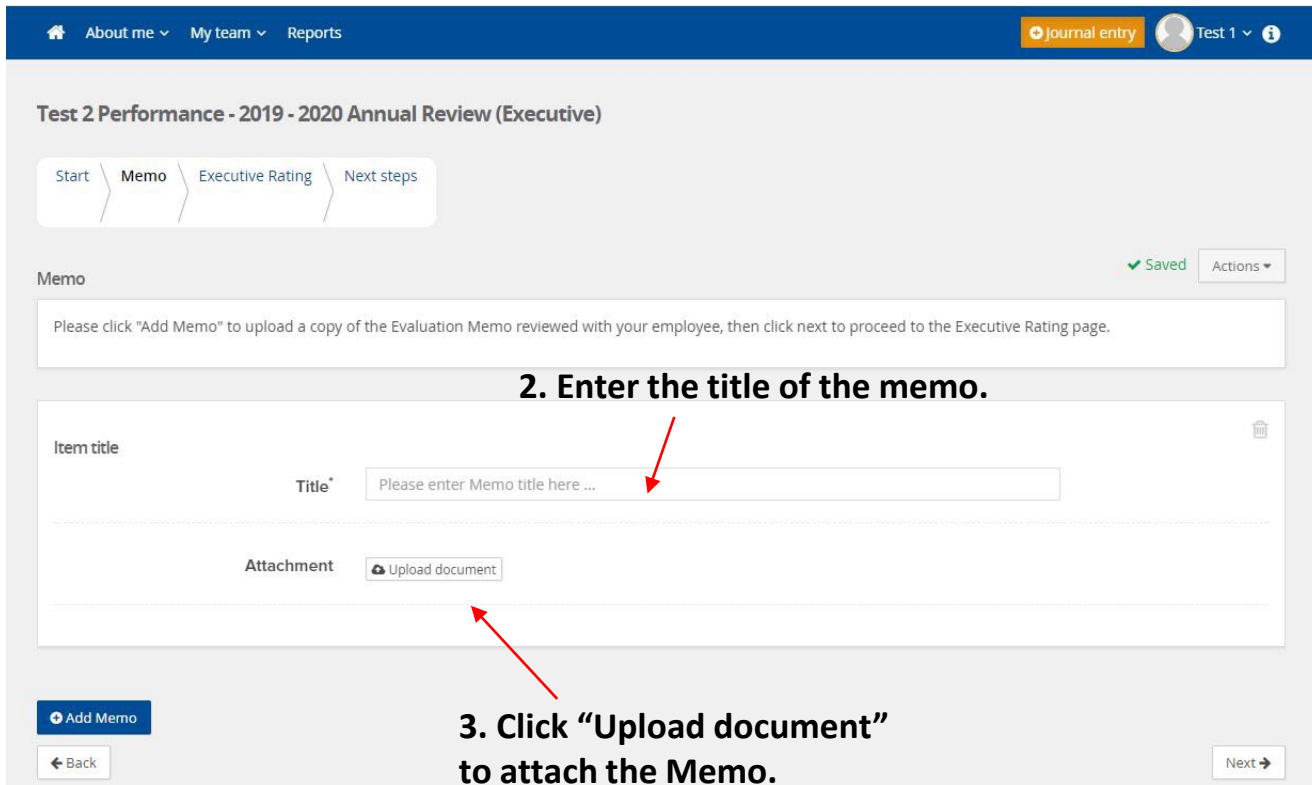
You may view a summary of the evaluation by clicking **“Report”** under the **“Actions”** dropdown menu.

You may view a copy of the evaluation by clicking on the **“View progress report”** under the **“Actions”** dropdown menu.

3. Click **“Next”** to upload the Memo and rate the employee.

Uploading Memo

**1. Click on
Add Memo.**



Test 2 Performance - 2019 - 2020 Annual Review (Executive)

Start > Memo > Executive Rating > Next steps

Memo ✓ Saved Actions ▾

Please click "Add Memo" to upload a copy of the Evaluation Memo reviewed with your employee, then click next to proceed to the Executive Rating page.

2. Enter the title of the memo.

Item title

Title*

Attachment

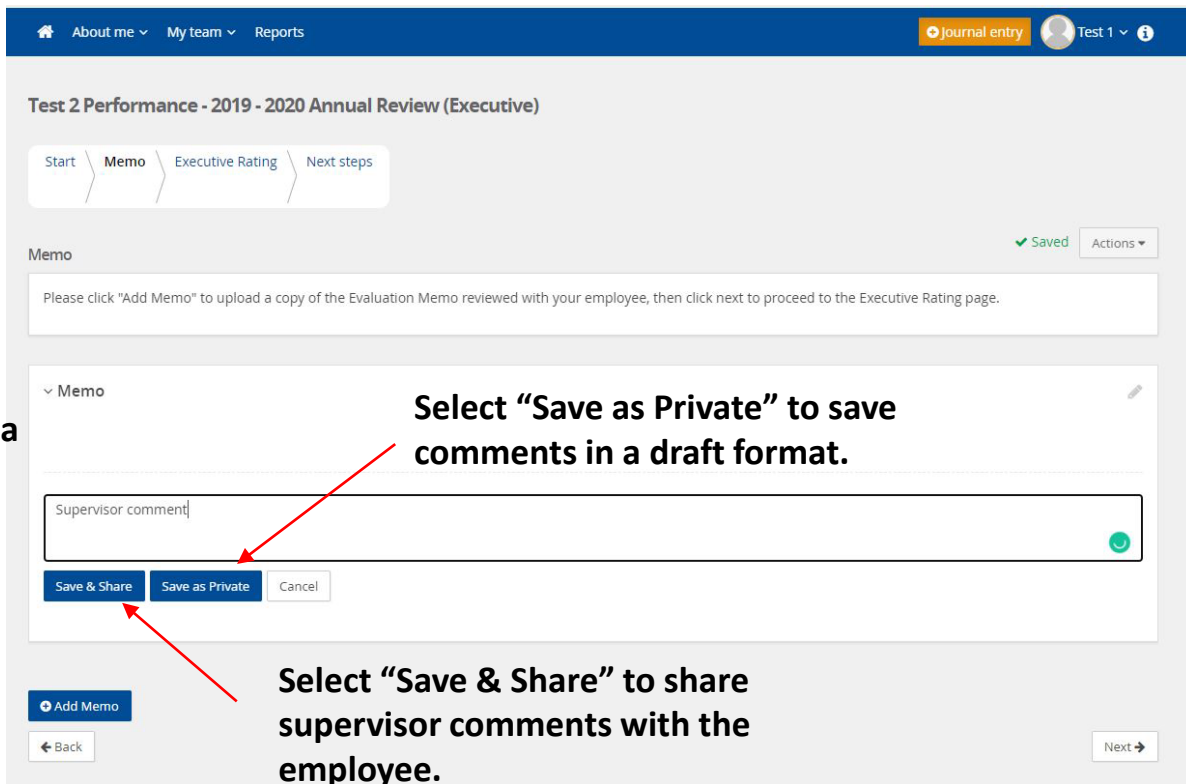
**3. Click "Upload document"
to attach the Memo.**

To delete a memo, click on the trash can icon in the upper right corner of the add memo field.

Click on "Next" to go to the next step in the process.

Adding Comments to Memo

The supervisor may click on “add comment” to include a comment with the memo.



Test 2 Performance - 2019 - 2020 Annual Review (Executive)

Start > Memo > Executive Rating > Next steps

Memo

✓ Saved Actions

Please click "Add Memo" to upload a copy of the Evaluation Memo reviewed with your employee, then click next to proceed to the Executive Rating page.

▼ Memo

Supervisor comment

Save & Share Save as Private Cancel

Add Memo

Back

Next

Select "Save as Private" to save comments in a draft format.

Select "Save & Share" to share supervisor comments with the employee.

Rating the Employee

🏠 About me ▾ My team ▾ Reports journal entry Test 1 ▾

Test 2 Performance - 2019 - 2020 Annual Review (Executive)

Start > Memo > **Executive Rating** > Next steps

Executive Rating ✓ Saved Actions ▾

Please provide a rating for your employee for below by clicking on a star;
Comments may be added by clicking on the "add comment" button.
Please click "Save & Share" to share your comments with your employee or "Save as Private" so save your comments in a draft format.

▽ Please rate.

Add a comment in the comment box if desired.

Test 1 Performance
★★★★★
Above

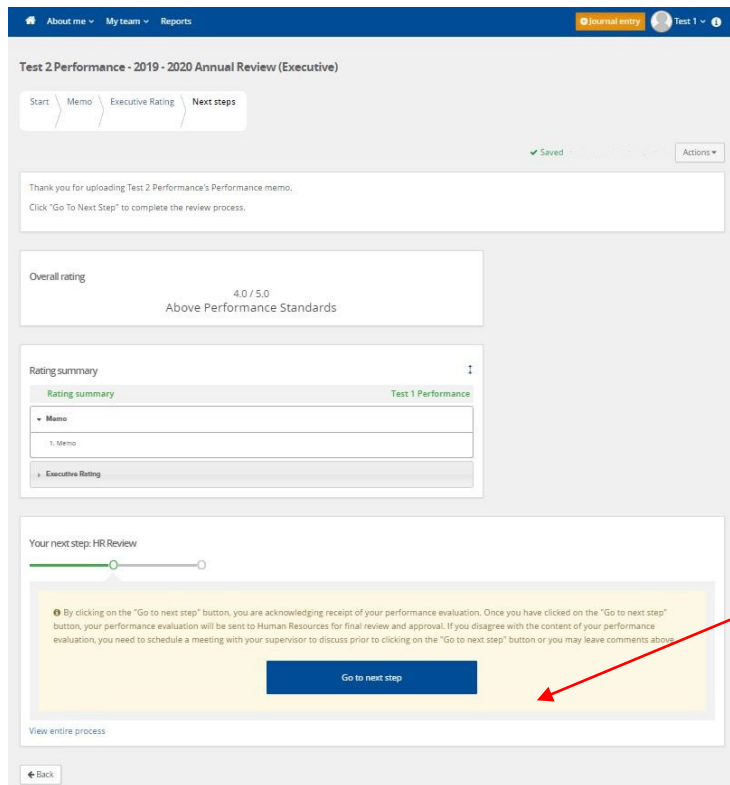
Save & Share Save as Private Cancel

4. Rate the employee by hovering over your Star selection.

⬅ Back Next ➡

Click on "Back"
to go back to the
previous page.

Submitting the Memo



Test 2 Performance - 2019 - 2020 Annual Review (Executive)

Start Memo Executive Rating Next steps

✓ Saved Actions

Thank you for uploading Test 2 Performance's Performance memo.
Click "Go To Next Step" to complete the review process.

Overall rating

4.0 / 5.0
Above Performance Standards

Rating summary

Rating summary	Test 1 Performance
Memo	
Executive Rating	

Your next step: HR Review

By clicking on the "Go to next step" button, you are acknowledging receipt of your performance evaluation. Once you have clicked on the "Go to next step" button, your performance evaluation will be sent to Human Resources for final review and approval. If you disagree with the contents of your performance evaluation, you need to schedule a meeting with your supervisor to discuss prior to clicking on the "Go to next step" button or you may leave comments about

Go to next step

View entire process

Back

The supervisor may review the overall rating and a summary of the employee's evaluation.

5. Click "Go to next step" to complete the Memo process.

Questions? Contact us!



For more information, please contact Jack Kolodziejski, Assistant Director of Employee Relations, by phone: 850.474.2292 or email: jkolodziejski@uwf.edu.
