

BURRELL COLLEGE OF OSTEOPATHIC MEDICINE

STANDARD OPERATING PROCEDURES

Performance Evaluation		SOP #: HR.022.02
Effective Date	8/16/2016	
Last Revision/Review	12/01/21, 9/8/2023	

1. Purpose

Burrell College of Osteopathic Medicine (Burrell) utilizes a performance evaluation program: to maximize employee's overall job performance and professional development; to periodically record essential information concerning the performance level and strengths/weaknesses of an employee in relation to career development, including potential for advancement and suitability for other jobs and training; to support documentation of goals and expectations, and to strengthen lines of communication between management and employees.; to assist management in making thorough, objective and factual evaluations of the performance of employees under their supervision; to motivate each employee to seek ways to improve performance where needed; and to enhance overall employee relations.

2. Related Policy/Authority

Burrell Policy B7550

3. Faculty/Staff Responsibilities

All faculty and staff that are employed by Burrell.

4. Definitions/Abbreviations

Current Performance Management Software: PerformYard

Probationary Review:

1. A performance evaluation will be completed for all new hire/new-to-position employees by management during the month following their ninety-day probationary period. Employees with an overall evaluation score of "does not meet expectations" monthly follow ups with written evaluations with their supervisor, along with a formal improvement plan. Employees failing to move out of the "does not meet expectations" category after 120 days will either be reassigned to another job at the discretion of management, or their employment will be terminated. Performance evaluations completed at the conclusion of the probationary period for both exempt and non-exempt staff are to be completed in the performance management software . For faculty working minimum hours within the first 90-days, the supervisor may request to extend the probationary period to allow additional time to evaluate.

Annual Review:

1. Supervisors will meet with and formally review the performance of each regular employee typically beginning in the month of May each year. The annual evaluation will focus on a goal-setting exercise for the new fiscal year, drawn from College/Department goals. Employees with an overall "does not meet expectations" score on their evaluation, will not qualify bonuses for the fiscal year for which they are being evaluated.
2. A separate evaluation form is to be prepared for faculty versus staff employees, based upon the official classification of the employee's primary position.

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5. Procedural Steps

1. Performance evaluation provides both supervisors and employees the opportunity to discuss job tasks, identify development needs, encourage and recognize strengths, and discuss positive and purposeful approaches to meeting goals. The objective of the performance evaluation is to:
 - a. Determine if training is needed
 - b. Identify areas where improvement may be needed
 - c. Revise or update individual goals
 - d. Evaluate job performance in terms of meeting goals and job responsibilities
 - e. Compensate for merit or promotional increases
2. All full and part time employees will receive a performance evaluation annually. If an employee is transferred or promoted, an evaluation will be given within 90 days after the transfer or promotion.
3. All new hire employees will receive a performance evaluation the month following their 90-day probationary period.
4. The supervisor is responsible to ensure that the performance of each employee is reviewed and recorded in accordance with the prescribed procedure.
5. Human Resources will provide a systematic procedure to ensure that a viable performance evaluation program is ongoing.
6. Human Resources will monitor the performance evaluation procedure to ensure consistency in application throughout the College.
7. All evaluations will be prepared by the employee's immediate supervisor to ensure an accurate evaluation of the employee. Each evaluation should be reviewed by the appraiser's immediate supervisor prior to any discussion with the affected employee. Differences of opinion on the employee's evaluation should be discussed and resolved if possible.
8. If an employee has transferred departments or location midyear, the two supervisors will collaborate to complete the annual evaluation.
9. The formal evaluation interview discussion is not to occur with the employee until the evaluator has discussed the evaluation with their supervisor.
10. In addition to rating several individual areas of performance, the supervisor must assign an overall performance rating of the performance factors, which reflect Burrell's core values.
11. The supervisor shall also explore the employee's interests by providing the employee the opportunity to complete the "Employee's Comments" section. Following all reviews and required signatures, the completed evaluation form will become a permanent part of the employee's personnel file.
12. Evaluations will be completed, signed, and submitted via performance management software. At the end of each evaluation cycle, the Office of Human Resources will review each evaluation for career development, professional development, and training purposes. The Office of Human Resources will download a copy of each completed and signed evaluation to be placed in the employee's personnel file.

GUIDELINES FOR PREPARING FOR THE PERFORMANCE EVALUATION INTERVIEW

1. All sections in the evaluation form have a specific employee developmental purpose and must be completed in detail.

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2. Establish a date that is acceptable to the employee and that will permit adequate and uninterrupted time for discussion.
3. Inform the employee well in advance and suggest that he/she prepare for the interview with questions on topics which he/she wishes to have discussed, with a focus on the employee's career objectives. The evaluation is designed to be completed in a constructive coaching manner, with the employee, by the supervisor.
4. Provide careful, objective thought on the individual's performance for the period being evaluated-- NOT previous performance, future predictions, or areas not related to job content.
5. Place special emphasis on the incumbent's current performance in meeting his/her objectives of the existing fiscal year.
6. Encourage open and free discussion during the evaluation interview to maximize beneficial results of the evaluation.

6. Reports/Charts/Forms/Attachments/Cross References

<https://burrell.edu/wp-content/uploads/2016/12/Faculty-Evaluation-Form.pdf>

https://burrell.edu/wp-content/uploads/2016/12/Evaluation_final.pdf

7. Maintenance

Human Resources; to be reviewed annually.

8. Signature

Approved by

9/20/2023

VP Administration

Date

9. Distribution List

Internal/External

10. Revision History

Revision Date	Subsection #	Summary of Changes	New/Cancellation/Replacement Procedure? (if applicable)	Approval Date
12.1.2021	5	Added information regarding staff vs faculty evaluations		12.2.2021
9/8/2023	4 & 5	To reflect updated processes due to software update		9/20/2023