



Birmingham-Southern College

**FORMAL REVIEW - SUPERVISOR GUIDE
GENERAL INSTRUCTIONS
PERFORMANCE EVALUATION**

The performance evaluation process is designed to create an open dialogue between your employee and you. The foundation for the process is your employee's job description. A review of your employee's job description and a discussion of the integration of the core values including your employee's skills, experience, and methods comprise the formal evaluation.

A formal performance evaluation will be conducted annually in a **two-step process** with 1) an Initial Meeting and 2) a Formal Review. Instructions and sample forms for the Formal Review are provided in this guide.

All performance evaluation forms are available at: www.bsc.edu/administration/humanresources/performanceevaluation if you and/or your employee would like to review the documents or make notes in preparation for the Formal Review.

The performance review process will begin each year on **July 1**. Completed review forms are due to the Office of Human Resources no later than **August 15**. The review process can begin earlier but must be completed by August 15.

Formal Review:

- Document your discussion of the agreed-upon appropriate (minimum five) core values using the supervisor and employee discussion forms provided on Pages 4-5. You are encouraged to include your employee's achievements during the past year as part of the discussion. Core Values Discussion forms should be reviewed and initialed by your employee and you at the end of the discussion.
- Complete the Action Plan using the form provided on Page 6. Include a discussion of your employee's career objectives and development needs and specific action(s) to be taken.
- Provide your employee with the original Performance Evaluation form. Furnish a copy of the form to Human Resources. Retain a copy for your office file, if desired.



Birmingham-Southern College

*** SUPERVISOR GUIDE ***
PERFORMANCE EVALUATION

Birmingham-Southern College encourages ongoing communication between your employee and you to discuss goals, accomplishments, and areas for greater focus or improvement. This form is intended as a foundation for an annual discussion of performance.

Note: Your employee should complete the separate Personal Performance Self-Assessment prior to formal discussion.

Name: -----

Department: -----

Title: -----

Performance discussion and review conducted on -----	
	Date
----- Employee Signature	----- Supervisor Signature

Approved	
----- Vice President	----- Date

CORE VALUES

- **Accountability** – How well you accept responsibility and meet schedules, deadlines, and goals.
- **Communication** – How well you communicate verbally and in writing.
- **Cost Consciousness** – How well you manage resources, identify cost-saving measures, and meet budget requirements.
- **Customer Service** – How well you respond to customers, internally and externally.
- **Decision Making/Problem Solving** – How well you analyze problems and make effective decisions.
- **Ethics** – How well you promote the values and practices of the College.
- **Flexibility** – How well you adapt to change and balance multiple priorities.
- **Initiative** – How well you demonstrate a willingness to use new and different approaches in completing tasks and offer creative solutions.
- **Innovation** – How well you use your creativity and imagination to develop new ideas.
- **Quality of Work** – How well you accurately and thoroughly perform your job.
- **Teamwork** – How well you work with others.
- **Technical Knowledge/Job Knowledge** – How well you demonstrate the understanding, knowledge, and technical skills required for your job.

Additional Topics for Discussion:

- **Other Job Responsibilities** – How well you complete special assignments or projects beyond the scope of your job description.
- **Safety** – How well you follow safety procedures, identify unsafe practices, and safely operate and properly maintain company equipment.
- **Athletic**-How well you comply with the rules and regulations established by BSC, The National Collegiate Athletic Association (NCAA), and the SCAC related to your assigned work responsibilities, goals, and objectives.
- **Other**

Name: _____ Date: _____

SUPERVISOR - CORE VALUES DISCUSSION FORM

Consideration should be given to your employee's overall performance level, achievements and strengths, future performance expectations and goals, and areas requiring improvement and the actions which can be taken to improve and/or sustain performance.

The most appropriate core values (minimum of five) should be selected through an interactive process between you and your employee, although your expectations will ultimately govern if there is a difference of opinion. Additional values may also be included. Describe below how your employee has or has not met the expectations and goals with respect to each core value selected.

1)

2)

3)

4)

5)

Discussion notes reviewed: Employee Initials Supervisor Initials

Name: _____ Date: _____

EMPLOYEE - CORE VALUES DISCUSSION FORM

Your employee is encouraged to provide comments about the performance evaluation process, their job, and their interaction with you and other general observations.

1)	
2)	
3)	
4)	
5)	

Discussion notes reviewed: Employee Initials Supervisor Initials

Name: _____ Date: _____

ACTION PLAN

Consider the area(s) in which you need to improve and develop an action plan.

Areas you need to improve:

What specific actions will you take to increase job effectiveness? How and when will these actions be implemented?

Career Objectives:

Consider your career objectives in your current position and for the future.

Current:

Short Term:

Long Term:

Professional Development:

Consider your participation in professional development opportunities. Is development needed in your current position to further your advancement opportunities at BSC?

Action Plan reviewed: Employee Initials Supervisor Initials