Staff Performance Appraisals:
Completing a Self-Evaluation

Overview

This document will guide you through the overall staff performance appraisal process, highlighting areas that benefit from additional instruction or detail.

PLEASE READ

NOTES

- This document includes a ***one-page summary*** of the process that includes enough information to get you started. Additional and more detailed process information follows in the "Completing the Evaluation Process" section.
- Some departments, such as the Police Department and Athletics, use a modified or different evaluation. While some of the details may be different, the mechanics are the same.

Important Things to Know

- The Ratings Summary section is at the top of the document, but still serves as a spot for overall comments and information not included elsewhere including significant successes and setbacks, final comments, and future development recommendations. It's probably easiest to compete this section last.
- If you have current goals entered in Ignite, they will be included on the evaluation document. Please make any updates and give your manager time to approve them prior to completing your self-evaluation. If you did not enter goals, the review can be done without them.
- Future goals will be added to Ignite in a separate process that will begin later in the year (more information to come).
- Both you and your manager must sign off in Ignite to indicate that the performance discussion meeting took place. The process is not finished until you have signed off. However, the manager must sign off first before you will be able to.

Key Difference from Previous Years

- The names of the ratings have been changed for greater clarity. The underlying ratings have not changed, just the names. This change was based on feedback with the intent is to provide better and more consistent understanding for all.

Previous Rating Name	New Rating Name
1. Area of Concern	1. Does Not Meet Expectation
2. Area of Needed Development	2. Inconsistently Meets Expectations
3. Area of Competence	3. Consistently Meets Expectations
4. Area of mastery	4. Consistently Exceeds Expectations

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READ FIRST

This is a brief overview of navigation and process for evaluations. More details are available in the later sections.

One Page Summary on Evaluations

Evaluation Process (Employee steps are in yellow steps and are shown below)

1	2	3	4	5
Employee completes and submits self-valuation. (by March 20)	Manager completes the evaluation. (by April 12)	Manager shares completed evaluation with employee, and they meet to discuss. (by April 26)	Manager indicates performance review meeting was held. (by April 26)	Employee confirms performance review meeting was held. (by April 26)

Navigation to Evaluation

1. Me > Career and Performance > Performance > 2023-24 Staff Performance Review (*Performance Documents Section)*

Completing the Evaluation

1. The document has several sections. Each section is completed separately and accessed through the **Edit** or **Evaluate** buttons.
   - ***Ratings Summary***: This section shows the overall calculated rating from the other sections AND includes a comment section for you to complete. Provide a brief overview of your successes and challenges from the past year. Be sure to include important projects, assignments, significant changes to duties or responsibilities, as well as any performance or development goals. What went well? What were some of the set-backs, challenges, or unexpected circumstances which were either overcome or impacted completion?
   - ***Core Commitments***: This section used both a drop-down ratings scale as well as a comments box for each of the six core commitments. Ratings are required and comments are recommended. It is strongly recommended to add comments if you select the highest or lowest rating.
   - ***Job Performance***: This section also uses a rating scale and comment box.
   - ***Performance Goals***: If you have entered performance goals in Ignite for the past year they will be included here. There is a comment section, but no rating.

2. When finished you can print or save the document as PDF using the **Print** button. Click **Submit** on the same page to submit the self-evaluation to your manager.

Confirming Performance Review Meeting was Held

1. Navigate to evaluation as described above. Click on the **Acknowledge Meeting** button. Note, you will not be able to do this until *after* your manager has first indicated the meeting was held.

Viewing Completed Document After Manager Shares

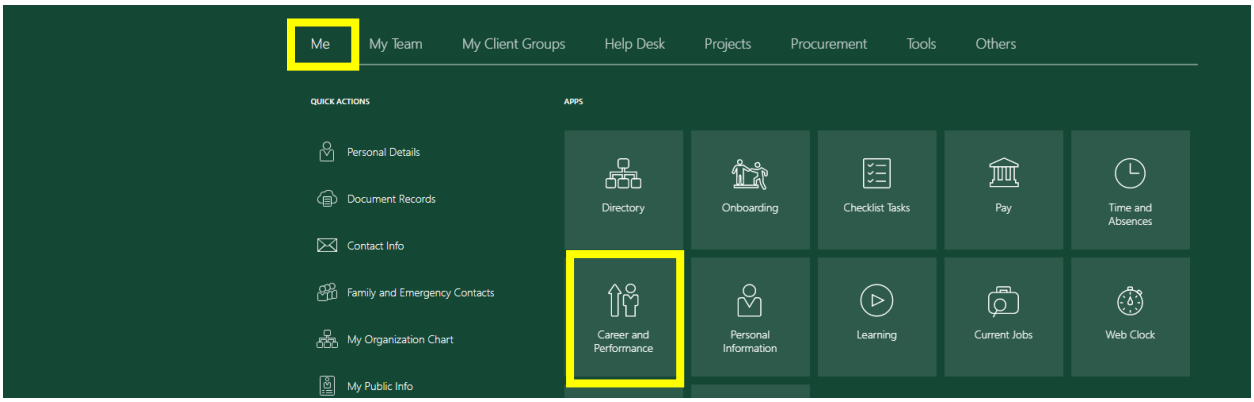
1. Navigate to evaluation as described above. You can now view, save, and print this document using the **Print** button.

Completing the Evaluation Process

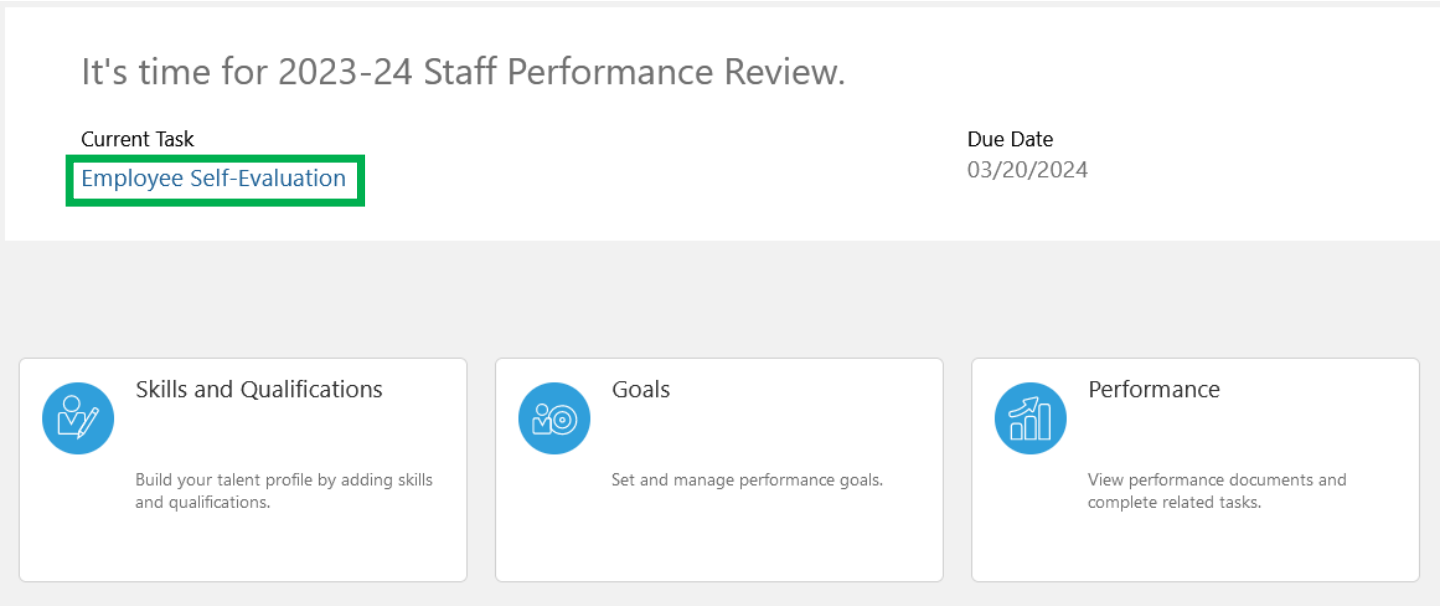
NOTE: Please update your current 2023-24 goals in the Ignite Goals module and have your manager approve the updates before starting your self-evaluation.

1. Navigating to the Performance Module

1. You can easily access the **Self-Evaluation** using the **Me** tab on the home page and selecting the **Career and Performance** tile.

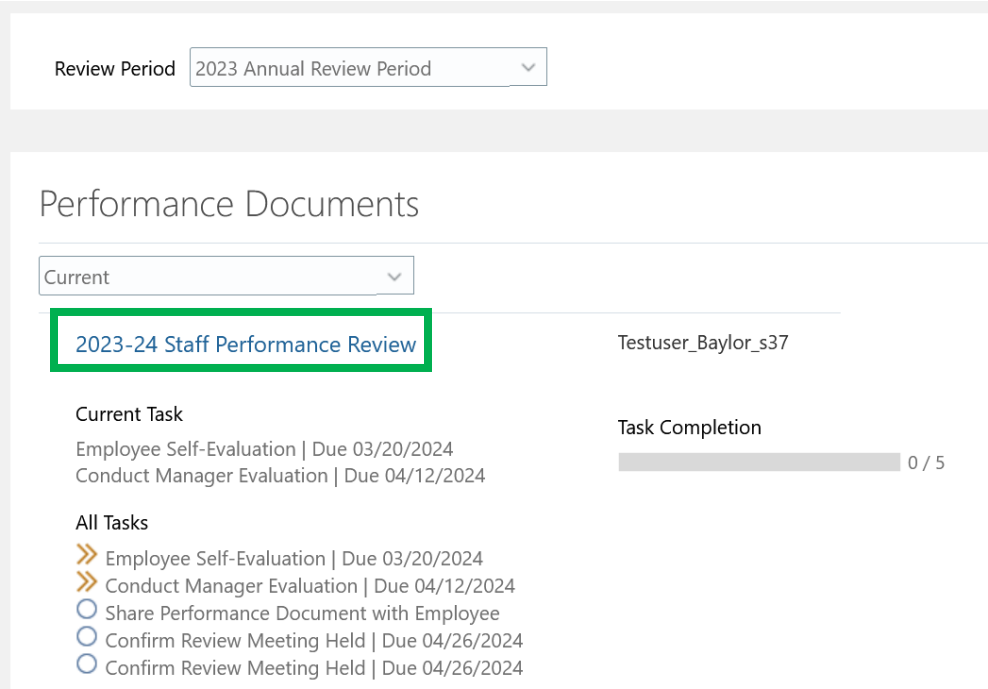


2. Upon entering the Career and Performance page, click the **Employee Self-Evaluation** link (preferred method). Alternatively, you can also access the evaluation through the **Performance** card (see below).



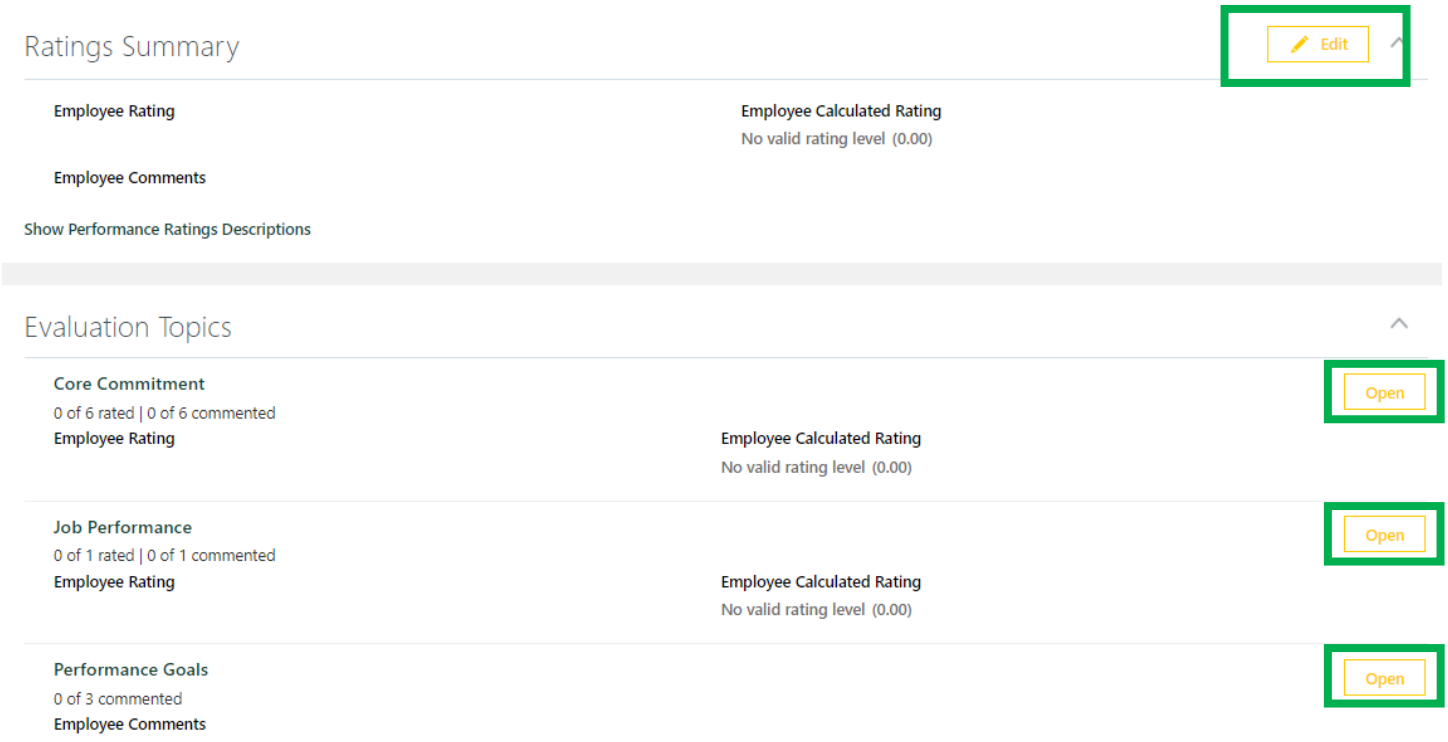
Alternate Method: Accessing using the Performance Card

If you use the "Employee Self-Evaluation" link it will take you right to the document. However, if you access the self-evaluation using the **Performance** card, you'll select your evaluation by clicking on **2023-24 Staff Performance Review**. Note: on this page you can also see what step the review is at and the due dates under "All Tasks".

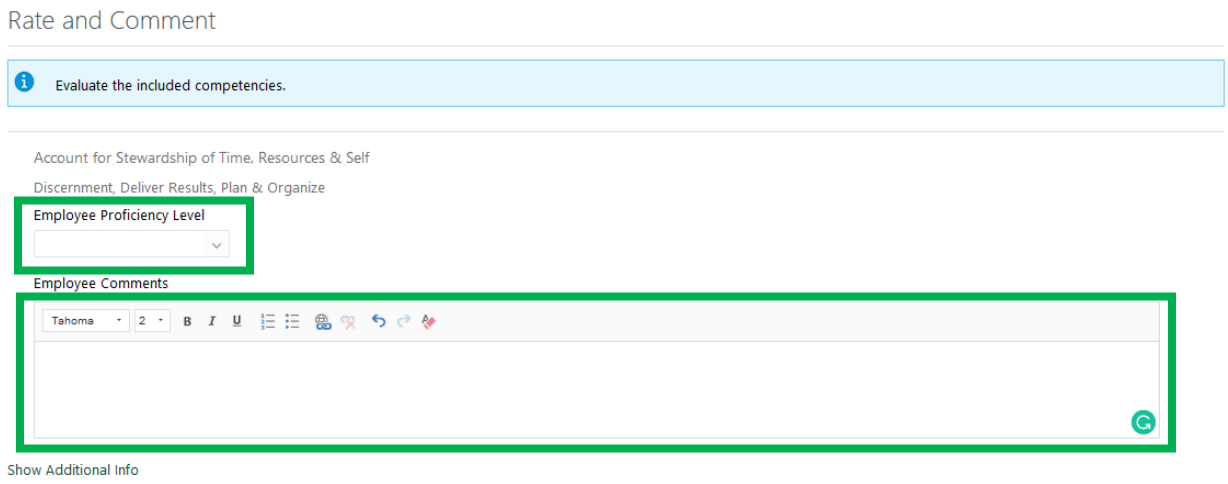


2. Completing a Self-Evaluation

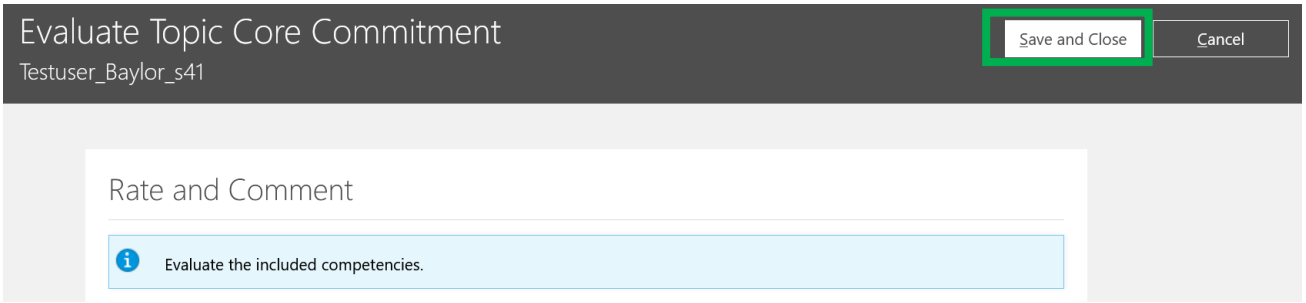
1. The self-evaluation form has several separate sections. There is an overall Ratings Summary at the top, followed by the Core Commitments, Job Performance, and Performance Goals (if applicable). To enter ratings or comments you must select **Edit** or **Evaluate** for each section. Even though the Ratings Summary is at the top, you may want to complete it last.



2. When clicking **Evaluate** you will be able to select a rating by using the drop-down menu. You can select a rating from the following options: **Does Not Meet Expectations**, **Inconsistently Meets Expectations**, **Consistently Meets Expectations**, and **Consistently Exceeds Expectations**. You can also enter comments by typing in the box labeled "Employee Comments." While it's recommended to add comments to help your manager understand why you chose the rating you did, it is *EXPECTED* to add comments if you use either the Does Not Meet Expectations or Routinely Exceeds Expectations ratings. Follow all of these steps for each evaluation topic category.



3. When you have finished the section, select **Save and Close** in the upper right to go back to the main form. Once saved, you can return to the document to edit or add additional information.

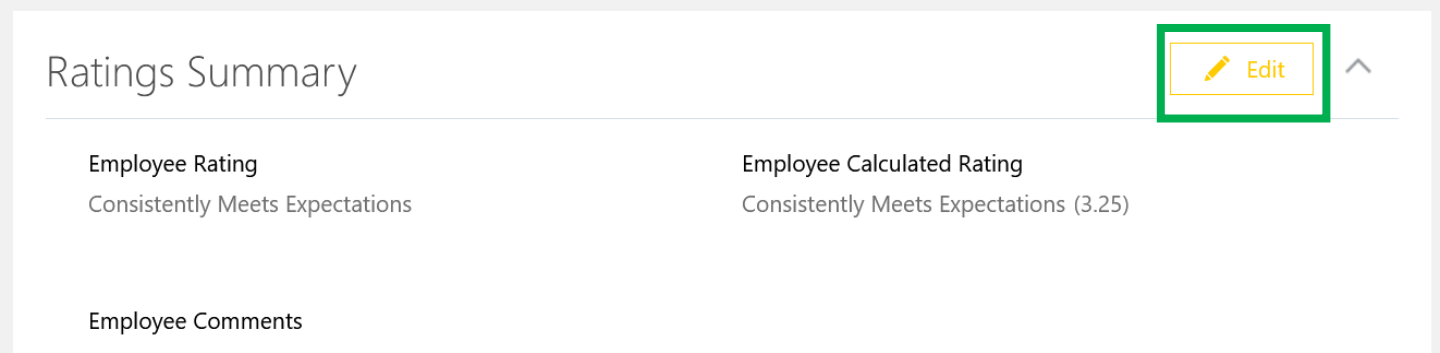


4. Repeat for the **Job Performance** section.

5. Repeat for the **Performance Goals** section for your 2023-24 goals, as applicable. The Performance Goals section does not use a rating, but you can add comments.

   NOTE: If you enter a new goal in Ignite for the 2024-25 review period after March 1, you will need to update the self-evaluation document to ensure the new goal is included in your self-evaluation. This step is unnecessary if you have simply updated a goal that was in the system prior to March 1. See section 3 for details.

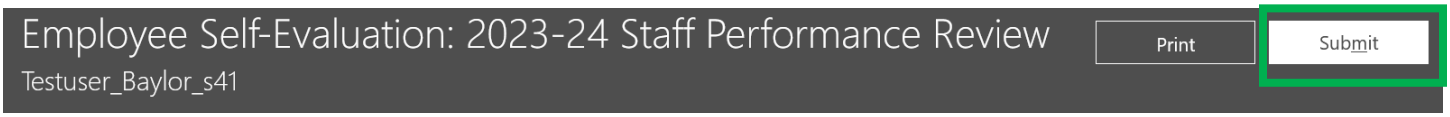
6. When you are finished evaluating yourself, an overall rating will be automatically calculated in the top of the screen in the Ratings Summary section. Select **Edit** to open the text box.



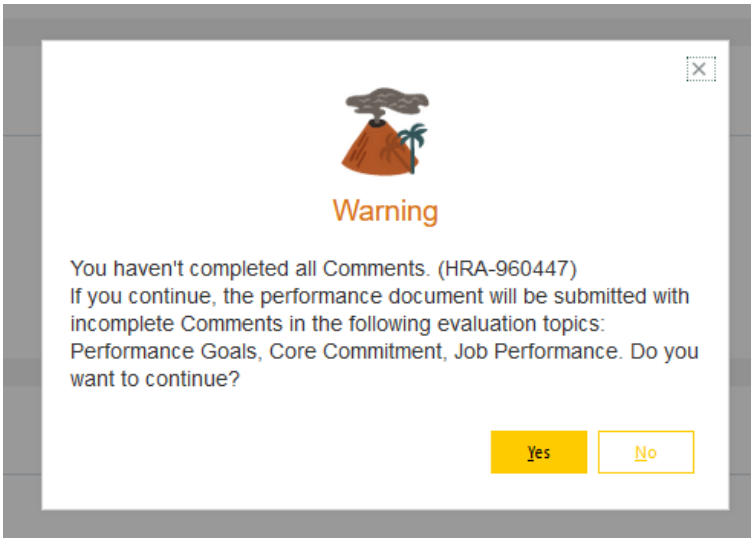
7. In the text box, provide a brief overview of successes and challenges from the past year. Be sure to include important projects, assignments, significant changes to duties or responsibilities, as well as any performance or development goals. What went well? What were some of the set-backs, challenges, or unexpected circumstances which were either overcome or impacted completion? When finished, click **Save**.

8. When finished, click **Submit** in the upper right-hand corner of the screen to submit your self-evaluation. Once submitted, you will not be able to make any additional changes. Your self-evaluation must be submitted before your manager can complete their part of the review.

   Note: selecting **Print** before you submit will allow you to view, print, or save the document as a PDF (you can also use this feature after submitting, as described on page 12).



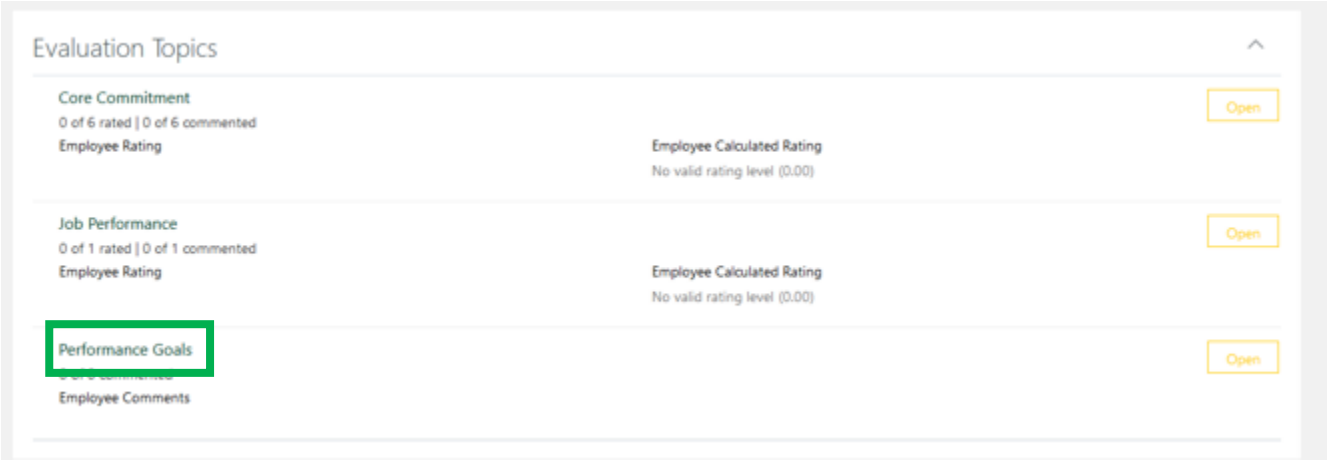
   Note: if you did not add comments to one or more of the sections, you will get a warning message like the one below. If you select **No**, the document will not be submitted and you can make changes. If you select **Yes**, the document will finish submitting.



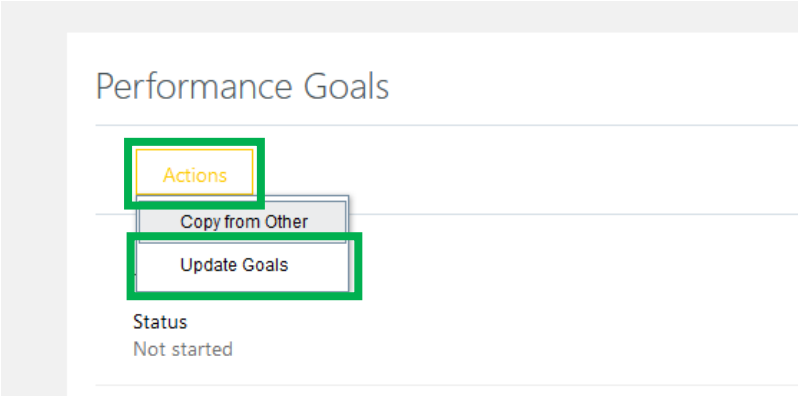
3. Updating Goals in Your Self-Evaluation After March 1

If you enter a new goal in Ignite for the 2023-24 review period after March 1, you will need to update the self-evaluation document to ensure the new goal is included in your review. This step is unnecessary if you have simply updated a goal that was in the system prior to March 1.

To update the self-evaluation document to include a new goal for the past year, click on **Performance Goals.**



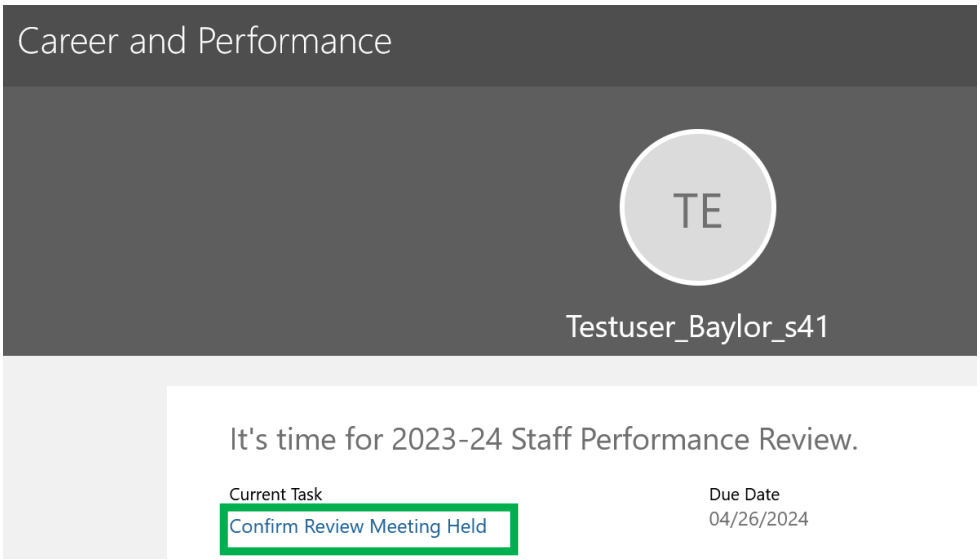
Then click on **Actions** and then **Update Goals**. The new goal should automatically be added to the self-evaluation. This step is unnecessary if you have simply updated a goal that was in the system prior to March 1.



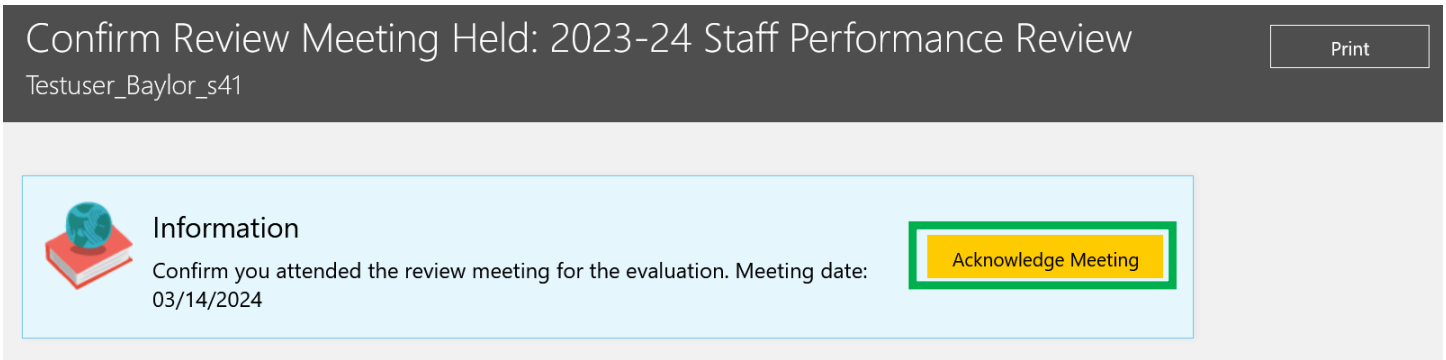
4. Confirming the Performance Discussion was Held

1. **VERY IMPORTANT:** After meeting with your manger to discuss your performance review, you will need to confirm the discussion meeting was held in order to complete the process. The performance review process is not complete until this final step.

   Navigate to the **Career and Performance** page and select **Confirm Review Meeting Held**. Note: this link will not be active until your manager first confirms the meeting in Ignite.

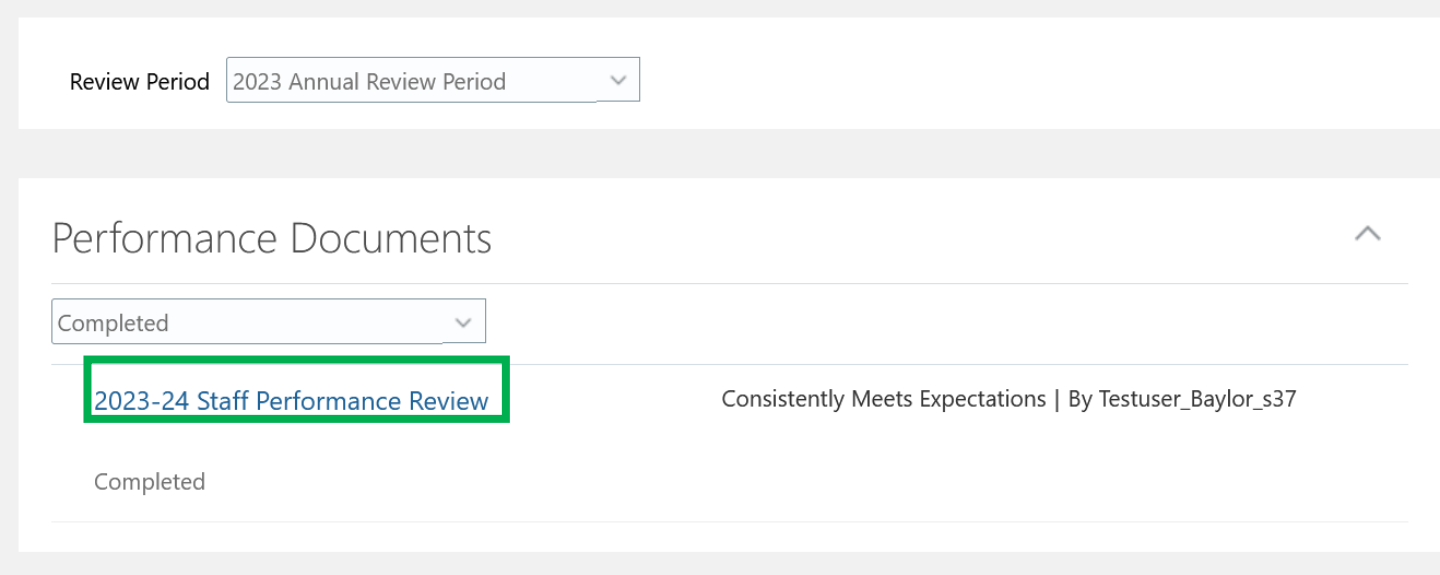


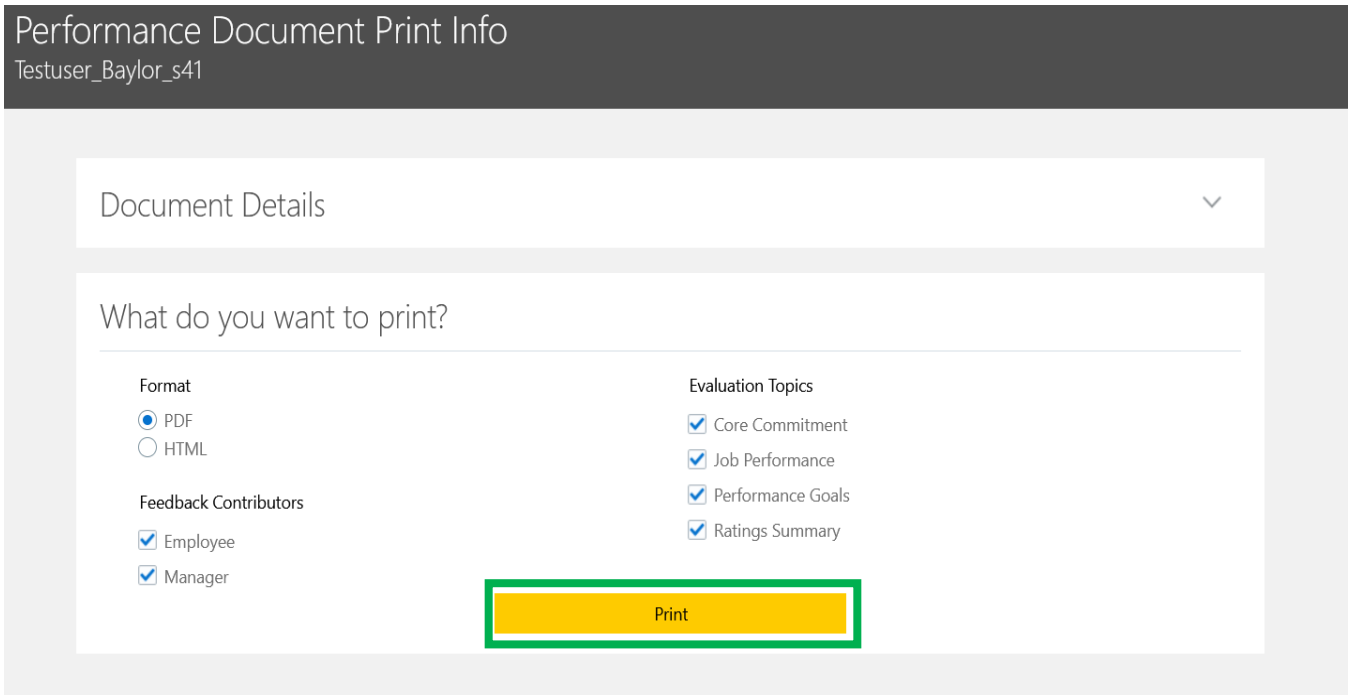
2. Click on **Acknowledge Meeting** to confirm.



5. Viewing Your Completed Evaluation

1. After writing your performance review, your manager will share the evaluation in Ignite. Navigate to your evaluation document as described earlier by going to **Career and Performance** from the main Ignite page, then select **Performance**. Under **Performance Documents** select **2023-24 Staff Performance Review.** (Note: You can also view previous year reviews by changing the **Review Period**.)



2. The document will open and you can view, print, or save as a PDF or HTML document using **Print**.

3. Selecting **Print** opens the Performance Document Print Info Screen. Choose the options you want and select **Print**.