

THE 360 PERFORMANCE REVIEW PROCESS

The 360 Performance Review is a developmental performance review process designated for use for all exempt administrative staff at SLU. Each exempt administrative staff member will undergo an annual performance review, with the review being a full formal and comprehensive 360 review every other year.

At the beginning of each academic year supervisors will divide their direct reports into two groups—one to receive a full 360 review in the current academic year and one to receive an abbreviated review in the current year and a full 360 in the next. Supervisors will notify their direct reports of what review is to be done and when.

PURPOSE:

The 360 Performance Review Process is designed to evaluate performance on existing goals and objectives, to identify goals and objectives for the future, and to identify developmental goals and needs.

PROCEDURE:

- 1) A description of the position is made available to both the supervisor and the person being reviewed. If the position description needs to be prepared and/or revised both the supervisor and the incumbent are involved in that process. They will discuss the position and arrive at a mutually acceptable description.
While a description of the position is necessary in order for the person being evaluated to prepare a self-evaluation the degree of detail will vary with each position. What is important is that there is a mutually agreed upon statement of basic expectations for the position being evaluated.
- 2) The staff member being evaluated prepares a self-evaluation.
This self-evaluation should describe the extent to which the reviewed staff member believes he or she has met the goals and objectives for the year agreed upon the previous year with the supervisor, or, for the new administrator, is meeting the goals and objectives that were discussed when the individual was appointed. In addition, the self-evaluation can be a vehicle for bringing forward issues the staff member would like to discuss. Whether or not goals and objectives have been agreed upon for this year, goals and objectives for the following year—an agenda for the year—should always be an outcome of the review process.
- 3) Interviews are conducted by the supervisor with individuals who can comment on the performance of the individual being reviewed.
The supervisor may interview, either in person or by telephone, all of the staff member's direct reports, including hourly employees; an appropriate group of staff members at the same organizational level and above with whom the staff member has an ongoing working relationship; representative faculty and students with whom the staff member regularly works or interacts, if appropriate; and other persons – trustees, alumni, outside consultants or business agents – as identified by the staff member being reviewed or the supervisor. The exact number to be interviewed in total is a judgment call that needs to balance coverage with feasibility. In some cases, it may be appropriate to invite written comments instead.

These interviews will generally last no more than a half-hour. Interviewees are asked to come prepared to discuss the staff member's strengths and weaknesses, and to provide any advice they might have on how the staff member might succeed better in his or her job.

If possible a copy of the position description and/or the goals and objectives of the person being reviewed can be provided to assist in the interview.

The supervisor should take extensive notes during the interviews and, when the interview process is complete, summarize them in writing in a way that protects the anonymity of the interviewees, highlighting the themes that emerge, and incorporating these themes and general information in the evaluation document which will be shared with the staff member being reviewed.

- 4) In the full formal and comprehensive 360 review, the interview summary and themes, the self-evaluation, and the goals and objectives will serve as the basis for an extended conversation between supervisor and staff member.

Some supervisors may find it helpful to write their own evaluation of the employee at the same time as the employee writes the self-evaluation, and to share it in advance of the evaluation meeting. Others may have devised a supplemental form that keys in on certain standard performance areas specific to the kind of job involved and will use that to provide feedback during the conversation.

- 5) When the evaluation conversation has been completed, a summary of the discussion will be written by the supervisor, shared with the staff member, who can comment on it if he or she wishes, and then filed for future use.

A copy will also be shared with the supervisor's supervisor. The supervisor who prepared the evaluation will notify the Human Resources Office that the evaluation has been completed and is on file: the evaluation itself does not need to be sent to HR.

- 6) Finally, a set of goals and objectives for the following year—an agenda for the future—should be prepared, by the individual being evaluated, or by the individual and supervisor together, and discussed both to guide behavior and performance, and serve as the basis of the following year's review.

Though feedback on a staff member's performance from this process certainly might lead elsewhere occasionally, the 360 reviews are meant to be developmental, focusing on where each staff member is going, what the plan is, how he or she is going to get there, how he or she is doing so far, and what each staff member needs in the way of professional development to increase his or her chances of success.

*As excerpted from the description of the process written by President Sullivan, Feb. 1999.
Prepared by S. Cypert, Human Resources, January 2002*