

Classified Staff Performance Evaluation Reminder

Now is the time for supervisors of classified staff to complete final evaluations for their classified employees. Evaluations will be collected by each school, college or department in order that they may be submitted to Human Resources by the September 3, 2024 deadline (please disregard this notice if you do not supervise any classified staff).

All classified staff hired on or before July 31, 2024 must receive a 2023-2024 evaluation completed by September 3, 2024. For employees hired between April 1, 2024, and July 31, 2024, supervisors may evaluate these employees based solely upon core competencies. Performance plans and evaluations are mandatory for all permanent classified staff, including retirees hired as permanent classified staff. Supervisors are required to meet with employees to discuss evaluations. These meetings may be conducted in-person or via video conference. The correct rating scale for classified employees is the five-level rating system negotiated and approved by the State Personnel Director and Colorado WINS. The rating scale is included in the [updated classified staff evaluation form](#) and on page 3 of the [University of Colorado System Performance Management Program](#). Alternate rating systems may not be used to evaluate classified employees.

Human Resources is providing an updated form to replace the automatic calculation form used last performance cycle. The form contains all the same fields as the previous form, so there is no change in the procedures and process of meeting with and evaluating classified employees. In fact, information from the previous form can be cut and pasted into the updated form. The only significant change is that this year's form

requires that supervisors manually calculate final scores. Click this link, [Classified Planning and Evaluation Form](#), to access the updated form.

Completed evaluations must be submitted to your department's Human Resources unit. Each school, college and department HR unit will collect evaluations for their organizations and report the ratings to Anschutz Human Resources using a spreadsheet to be supplied by CU Anschutz Human Resources. Campus departments will have until September 3, 2024, to submit their scores using the spreadsheet.

Supervisors:

- Conduct a preliminary evaluation discussion with each classified employee. You may ask employees to provide self-assessments based on the content of the performance plans for this evaluation cycle. Then draft an evaluation for each employee.
- Submit evaluations to the Reviewer (a designated individual within the unit) for approval. Reviewers have five days to review and return evaluations to supervisors. An employee should only receive an evaluation that has been approved by both the Supervisor and the Reviewer.
- With each classified employee, present and discuss the final, dually approved evaluation. Provide a copy to the employee (via email is acceptable) and present the original to your department Human Resources unit. Remember, employees have five days after the meeting with their supervisor to review their evaluations. Please conduct your final evaluation discussions early so that you will be able to allow for the five-day review and still submit to your HR unit on time.

Important:

- When using the updated form, please ensure that all pertinent fields/sections of the evaluation form are complete and accurate before sending it to your Human Resources department.

- You are highly encouraged to use decimals for individual goal ratings (e.g., 4.25). Though, the overall rating must be a whole number (1-5).
- Ratings for goals/objectives and core competencies must have associated “Results Achieved” describing and supporting the rating earned by the employee.
- Human Resources recommends completing the Evaluation Narrative section to sum up the overall performance. Still, the Evaluation Narrative (i.e., summary) does not substitute for including detailed descriptions of performance in the “Results Achieved” sections for each goal or objective, and core competency.
- The Reviewer (second level supervisor or appointing authority) must review and sign the evaluation of a classified employee’s performance before it is formally presented to the employee.
 - **NOTE:** Reviewer and Supervisor may not be the same person, under any circumstance.
- Proposed ratings are preliminary until approved by Reviewers. This must be emphasized when having preliminary discussions with employees.
- Reviewers and employees each must receive five (5) business days to review the ratings and sign the evaluations. Please plan accordingly so the appropriate review and signatures can be obtained. If an employee refuses to sign, the evaluation remains valid.

An overall rating of “Needs Improvement” or “Unacceptable” requires completion of either a performance improvement plan (PIP) or a Corrective Action (C/A) as part of the progressive discipline process. Please contact the [Human Resources Department](#) to discuss “Needs Improvement” or “Unacceptable” ratings and how they will be addressed with the employee.

If an employee has extenuating circumstances such as extended absences due to Family Medical Leave (FML or FAMI), Short-term Disability, Worker’s Compensation during the rating period (health or otherwise), please contact the Human Resources Department for proper guidance on evaluating the employee. Absences covered by job

protected leave may not negatively impact evaluation scores or ratings and may not be referenced in an evaluation.

Performance Management Documents

The 2023-2024 classified performance management evaluation form can be downloaded here: [Classified Planning and Evaluation Form](#) (please review the “Key to Rating Level” information on page 3).

Training Requirement for Supervisors

For CU Anschutz departments, the deadline for submitting full, original, signed classified employee evaluations and spreadsheets to the Anschutz Human Resources Office (Anschutz: Mail Stop F568 Attn: Evaluations) is Tuesday, September 3, 2024.

As a reminder, if you are a supervisor of classified staff, you are required to take the [Performance Management Training in Skillsoft](#).

Please contact PerformanceManagement@cuanschutz.edu with any questions.

Frequently Asked Questions

I supervise an employee hired in June of 2024. Does this employee receive an evaluation? He/she has been in our organization only a few weeks.

Answer: All currently employed classified employees hired during the 2023-24 fiscal year must receive an official evaluation using the Classified Staff Planning & Evaluation Form. If the employee was hired between May 1st and July 31st, the supervisor may choose to evaluate the employee solely using the five mandatory Core Competencies.

This employee will be leaving the department/university after on or after July 31st. Do I need to provide an evaluation?

Answer: Evaluations are required for all classified employees, except for those who officially retired from the state personnel system during the performance cycle (Aug. 1, 2023, to July 31, 2024).

If a classified employee has, or will be transferring, do I need to complete a formal evaluation?

Answer 1: If an employee moves to a position under another appointing authority or department during a performance cycle, an interim overall evaluation shall be completed and delivered to the new appointing authority or department within thirty (30) days of the effective date of the move (State Personnel Rules: 6-4 C. 1.)

Answer 2: Note that if an employee separates from CU during the performance year, the performance plan will be forwarded to the final ratings stages so that an overall rating can be completed.

If an employee moves to a position under another appointing authority or department during a performance cycle, an interim overall evaluation shall be completed and delivered to the new appointing authority or department within 30 days of the effective date of the move.

Supervisors who transfer or leave are required to complete close out evaluations on all their classified employees before leaving. This action will be referenced in the supervisor's own performance evaluation.

If an employee has more than one supervisor during the course of the evaluation cycle, each supervisor must complete a close-out evaluation for the employee. The employee's final overall evaluation score is determined by the supervisor who supervises the employee at the close of the evaluation cycle. That supervisor is responsible for gathering any close out evaluation(s) from past supervisor(s) for that evaluation cycle and determining the employees' final overall evaluation score (University of Colorado System Performance Management Program - IV. b. "Midyear Progress Review").

A classified employee on my team is not meeting performance expectations and will receive an annual evaluation rating of 1 (Unacceptable) or 2 (Needs Improvement). Is anything required at this time?

Answer: (University of Colorado System Performance Management Program and Department of Personnel and Administration Board Rule 6-6 B.) Performance that

needs improvement or is otherwise unacceptable as documented in the annual evaluation shall result in a performance improvement plan and/or a corrective action and a reasonable amount of time to improve, unless the employee is already under performance improvement, corrective or disciplinary action for the same performance matter. If needs improvement or unacceptable performance relates to a recurring performance issue that has resulted in a prior corrective action or disciplinary action, the appointing authority may take disciplinary action concurrently with issuing the annual evaluation. The appointing authority may proceed immediately to disciplinary action, up to and including immediate termination, if the act is so flagrant or serious that immediate discipline is proper.

Consult with both your department Human Resources Business Partner and your Anschutz Human Resources Consultant (email: PerformanceManagement@cuanschutz.edu).

What do I need to do after I complete performance plans for my direct reports in the state classified system?

Answer: Set the stage for continued good performance by completing 2024-25 Performance Plans.

- [University of Colorado System Performance Management Program \(IV. Performance Planning & Goal Setting\)](#)
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As a supervisor how can I learn more about my Performance Management Duties and Responsibilities?



Training: Anschutz Human Resources – Learning and Development: “Required Training”

- CU: Performance Management

Email questions to: PerformanceManagement@cuanschutz.edu