

## ***Performance Review Frequently Asked Questions***

**Q: What is the timeframe for this review period?**

A: The review period starts October 1, 2011 and goes through September 30, 2012.

**Q: Will there be any training on how to use the electronic evaluation system and conduct an effective review?**

A: Yes. Check the on-site training calendar on the Training Web Page.

**Q: Is there anything in the review process that is new this year?**

A: No, but your supervisor must still have completed the Job Task Analysis (JTA) on the person within the past 12 months before he/she can send your appraisal forward to the next level rater.

### **Self Assessments**

**Q: Do I have to complete a self assessment?**

A: Yes. All employees are expected to complete a self assessment. This simple process requires you to rate yourself numerically against job and core expectations. If you would like to provide additional comments there will be a limited space on the form where you can elaborate. Self assessments will provide a basis for dialogue between the employee and supervisor to discuss overall performance and upcoming job expectations.

**Q. At what point in the process can I no longer make changes to my self assessment?**

A. Employees can no longer change their self-assessments once they have hit **the Save, Forward to Supervisor** button. Supervisors/managers can no longer change their evaluations once they have hit the **Save, Forward to Next-Level Supervisor** button for next level signature. Forms may be rerouted for adjustments by HR or the Division Head as deemed appropriate or for corrections.

**Q: Will I have access to complete my self-assessment or other evaluations off-site?**

A: Yes. You will have access off-site to complete evaluations, but you will need a PIN to access this. To obtain your PIN, follow the link once you have entering the online system or contact Cassandra Andrews at x7068, Bruce Ullman at x7170, Brandye Rogers at x5959, or April Sessoms at x7663.

### **Matrixed Employees**

**Q: How do I know if I am considered a matrixed employee or a service provider?**

A: You should consult with your immediate supervisor if you are uncertain. You can also

review the Matrix Staffing Process located on the HR webpage under Performance Appraisals.

**Q: If I have been matrixed out or am providing service to another group/division during this review cycle, how will that feedback be factored into my review?**

A: A matrix feedback form will be sent to the matrixed supervisor for whom you have been working, allowing him or her to provide direct feedback to your home supervisor. Your home supervisor will be responsible for incorporating the feedback into the overall review and rating score. The matrixed supervisor's summary of your performance will be shared with you and attached to the final appraisal that is submitted to HR.

**Q: If I am an employee who has been matrixed out, will my matrixed supervisor be required to provide my home supervisor with feedback on my performance?**

A: Yes. If you have been matrixed out or have been providing service to another group for 10% or more of the review period, your supervisor must request and receive feedback on your performance. This form will be attached to your performance appraisal.

**Q: Where can I find the Matrixed Staffing/Service Provider Process or Quick Reference Guide?**

A: The forms are available on the Employee Relations and Appraisal System pages of the HR website.

**Q: How does the "Work for Others" feedback get factored into the overall performance summary?**

A: This feedback can be considered by your supervisor; however, any time spent in a matrixed or service provider capacity should be captured using the Matrixed/Service Provider forms. The "Work for Others" feedback will be captured with the WFO form.

**Q: What is the purpose of the first manager-employee meeting if the Home Unit Manager (HUM) has not received the Work Unit Manager's (WUM) feedback?**

A: The meeting is to go over next year's expectations and to gather feedback from the employee. The HUM is encouraged to make contact with the WUM if the matrixed feedback has not been submitted by the first scheduled meeting to obtain general comments about the employee's performance and incorporate into the broader discussion.

## **Expectations**

**Q: Will every job/technical expectation for the upcoming review period be weighted the same?**

A: Not necessarily. Your supervisor will meet with you to discuss the weighting for each job expectation.

**Q: Are the core expectations weighted the same?**

A: Yes. Core expectations will be weighted equally for all employees at the Lab to reinforce a common set of beliefs and behaviors that everyone is expected to demonstrate.

**Q: What job/technical expectations will I be measured against for this review period?**

A: You will be measured against the job expectations/goals you were given for the FY12 review period that ends September 30, 2012.

**Q: What's the minimum number of job expectations I can have? The maximum?**

A: There must be at least 4 and no more than 7 job expectations.

**Q: Can changes be made to my Job Knowledge and Expectations during the year if requirements for my job responsibilities and focus area change?**

A: Yes, changes can be made to the FY13 Expectations during the year, but these changes must be made by your supervisor. If a change is made to your expectations, you will receive an email notification.

**Q: How often should I discuss my performance review with my supervisor during the year?**

A: You should discuss your performance review, job knowledge and expectations with your supervisor as often as you feel necessary to keep the lines of communication open.

**Q: How do changes to the form work during the year if an employee's job expectations change?**

A: The supervisor can modify the job expectations as priorities change. Once an expectation has been changed the employee and HR will receive a notice via email. Another avenue to capture changes in job expectations is the Matrixed or Service Provider Agreement.

**Q: If a Core Expectation is also an important part of an employee's day-to-day job, can that be listed in the Job Expectation section?**

A: Yes, it can be listed in both places, but the technical expectation should be very job-specific.

**Q: During the year, if an expectation is no longer relevant can it be removed?**

A: Yes. Supervisors can adjust expectations at any time throughout the year. The employee will receive a notice of the change. Keep in mind every employee must have a minimum of

four expectations and the expectation weightings must total 100%. If an expectation is no longer relevant, the supervisor should adjust accordingly and perhaps substitute another expectation. The supervisor should also take the time to review weightings of the expectations and adjust accordingly.

## **Ratings**

### **Q: What is the purpose of my first employee/supervisor meeting?**

A: The purpose of your first meeting is to serve as a PRELIMINARY discussion between you and your supervisor to discuss the self evaluation face-to-face and planned FY13 goals. This helps ensure that the goals are meaningful, understandable, and achievable in both your opinion and your supervisor's opinion. The meeting may also serve as an opportunity to clarify the self evaluation in areas where your supervisor had questions and wants to review or set expectations.

### **Q: Can I rate myself or my supervisor rate me with half a number (ex. 2.5)?**

A: No. Only whole number ratings are accepted in the appraisal tool.

### **Q: Will supervisors be required to conform to a bell-shaped distribution curve when giving ratings to employees?**

A: No; supervisors should not force anyone to fit into this or any other pre-determined model.

### **Q: What is a Calibration Review?**

A: Each of the divisions will have a Calibration Review Meeting. This meeting will consist of the Division Head and his/her direct reports only. The purpose of this review is to consider all the appraisals in a division in terms of rating consistency and quality of feedback.

### **Q: What follow up action occurs if my overall performance rating is marginal or below?**

A: A Performance Improvement Plan (PIP) will be completed between you and your supervisor. This document will provide a timeline of actions to be taken to assist in improving your performance.

## **Promotions**

### **Q: How do promotions work?**

A: Each year supervisors recommend employees for promotion based on their performance. Your supervisor completes the Promotion Package and submits it to the Division Head for review. For all technical positions, promotion packages are reviewed and evaluated by Technical Review Committees (TRC). These are made up of employees with technical backgrounds similar to those seeking promotion. For more information on the TRCs, go to [http://www.jlab.org/div\\_dept/admin/HR/performance\\_appraisals/trcMembership.pdf](http://www.jlab.org/div_dept/admin/HR/performance_appraisals/trcMembership.pdf).

If you are not selected for the promotion after you have been recommended, you should receive feedback from your supervisor highlighting those areas that need further development. To be considered for promotion the following year, you must be recommended by your supervisor again.

**Q: What can I do to get promoted?**

A: You need to assume more responsibility and perform at a higher level than your current job classification requires. A dialog with your supervisor is a good way to put together an action plan for your further development.

## **General**

**Q: Who receives a performance evaluation?**

A: All employees will receive expectations for the next fiscal year during this review period. Employees who were hired on or before May 31, 2012 will receive a performance evaluation.

**Q: What if I disagree with my overall evaluation and/or merit? What recourse do I have?**

A: You can appeal your concerns to your Department or Division Head. If you still disagree, you can discuss it with the HR Department.

**Q. Where do I find the link to the electronic form and activation page?** A. You can access the performance evaluation form via the following link  
[http://www.jlab.org/div\\_dept/admin/HR/](http://www.jlab.org/div_dept/admin/HR/)

**Q. What if I need to make a correction to the form once it's submitted?**

A. The form can be returned to you to be modified. However, you will need to contact the person to whom you forwarded it and ask that it be sent back.

**Q. Where do employees make comments about their professional development?**

A. You can add your input to the Employee Summary section.

**Q. Can I print my evaluation?**

A. Yes, there's a print button at the top of the page.

**Q. Can employee and supervisor work on the evaluation simultaneously?**

A. Yes, but the finalization of each step must be performed in order.