

TO: Mr. Keith Best
FROM: Brigid Kennedy
SUBJECT: Instructions for the Evaluation and Planning Documents for Mr. Joe Sallenger
DATE: June 12, 2017

Enclosed are two forms for the above employee: 1) Evaluation Document and 2) the new Planning Document. It will be necessary to first complete the evaluation document. Completion of this appraisal provides an opportunity for you to discuss the work habits and overall performance during the past rating period.

- The "Position Description/Employee Performance Evaluation Form for Classified Employees" that was prepared at an earlier planning session (with signatures on front page) is attached in order that you might complete the evaluation. (See **pink** instruction sheet.) **Please make certain that any attachments provided with the Evaluation are signed by you, the Reviewing Officer, and the employee.**
- The new "Position Description/Employee Performance Evaluation Form for Classified Employees" is enclosed and will be used as the official Position Description, Planning Document, and Evaluation for the next review cycle. (See **pink** instruction sheet.) The information on the previous Position Description has been transferred to this document. If you are in agreement with the document as prepared, simply obtain the appropriate signatures and dates for page one only and return to Human Resources.

During the coming year, if job functions need to be modified, you may request the "Position Description/Employee Performance Evaluation Form for Classified Employees" (which was completed during this planning session) from the Human Resources Office. Modifications to this document can be made up to **three months prior** to 8/1/2018.

Signatures Needed	Date to Return Documents to Human Resources
The rater and reviewer must sign the documents before the employee signs. All signatures must be obtained before sending the documents to Human Resources.	07/31/2017

If you have any questions regarding this process, please call me at Ext. 1144.

Instructions for Position Description and Planning Document Stage

The Position Description, Planning Document, and Evaluation Document have been combined into one document. Following are instructions for completing the Position Description and Planning Document.

I. Planning Stage Acknowledgment

- Once you (rater/supervisor), the reviewer, and the employee have had an opportunity to review the document, each will need to date and sign on page 1 only for the Planning stage. After ALL signatures have been obtained in this section, return to Human Resources.

II. Requirements and Supervisory Responsibilities

- No. 1 of this section includes the State Requirements for the position and No. 2 includes the FM Preferences for the position.
- No. 3 is for you to describe the guidelines and supervision an employee received in order to do the job.
- No. 4 indicates the additional requirements of the job, such as work environment, physical requirements, and overnight travel.
- No. 5 indicates the number of state employees directly supervised by the employee. If the employee indirectly supervises, include that number in Total Number Supervised, which includes the ones directly supervised and indirectly supervised. The classification of employees indirectly supervised are not listed – only the number.

III. Job Purpose

- This is an abbreviated summary of the purpose of the position.

IV. Essential Job Functions of Position Description

- These are the Essential Functions on which an employee is rated.
- The Performance Level = P (1, 2, 3, 4); the Weighted Level = W. Your weighted points will be 95 for this section, unless you have added an objective as an attachment to your Planning Document for supervisory employees.
- Each job function must have success criteria indicating what will be expected of the employee for him/her to "meet performance requirements" at the time of the actual evaluation. For example, to "exceed performance requirements" or "substantially exceeds performance requirements" on a function, he/she must accomplish more than was indicated in the success criteria and at a higher level of performance.

V. Marginal Job Functions of Position Description

- There will only be one Marginal Function and it will be rated as follows: The Performance Level = P (1, 2, 3, 4); the Weighted Level = W. Your weighted points will be 5 for this section, unless you have chosen more weighted points for Marginal Functions (which can be no more than 10) or have added an objective as an attachment to your Planning Document for supervisory employees.
- The marginal job function must have success criteria indicating what will be expected of the employee for him/her to "meet performance requirements" at the time of the actual evaluation.

VI. Performance Characteristics

- The one characteristic listed must be included in the evaluation process. You will rate this section as an "A" for Acceptable or "U" for Unacceptable.
- You have the option of selecting 1 or 2 additional characteristics from the following list. If you add a characteristic, simply indicate the characteristic and definition in the space provided.

1. **Communication Ability:** The effectiveness with which the employee presents accurate information both verbally and in writing.
2. **Relationship with Others:** The extent to which the employee establishes positive relationships with co-workers (for example, being a good team worker, being tactful and courteous with co-workers).
3. **Ability to Work without Supervision:** The extent to which the employee can work by himself/herself; requiring very little supervision and being self-sufficient in assuming the duties of the job.
4. **Accuracy of Work:** The degree to which the employee makes mistakes or errors that requires correction.
5. **Cooperation:** The extent to which the employee cooperates with supervisors, associates and those for whom work is performed.
6. **Dependability:** The extent to which the employee can be relied upon to meet work schedules and fulfill job responsibilities and commitments.
7. **Use of Work Time:** How effectively and efficiently the employee uses his/her time to accomplish his/her job tasks (for example, does not wait until the last minute to work on important projects).
8. **Meeting Schedules:** The extent to which the employee efficiently completes his/her work and effectively meets deadlines.
9. **Punctuality:** The extent to which the employee is prompt in reporting for work and assignments/appointments at the specified time.
10. **Initiative:** The extent to which the employee works ahead based on his/her own judgment without waiting to be told.
11. **Adaptability:** The extent to which the employee can adapt to job or organizational changes.
12. **Willingness to Learn:** The extent to which the employee wants to learn about his/her job and asks intelligent questions about the job.
13. **Safety:** The extent to which the employee follows established safety practices and corrects unsafe work practices on the job.
14. **Job Knowledge:** The extent to which the employee knows the details of the job and follows the job procedures to the letter.
15. **Quantity of Work:** The extent to which the employee produces an amount of acceptable work in order to meet schedules over which he/she has control.
16. **Quality of Work:** The extent to which the employee neatly, thoroughly, and accurately completes job assignments according to established standards of quality.
17. **Attendance:** Concerns whether the employee is at work each day.
18. **Relationship with the Public:** The extent to which the employee establishes good relationship with the public (i.e., being courteous and helpful with the public).
19. **Development:** This refers to ongoing learning and growth both for the manager and for the employee. Developing involves – continuing education and training to stay abreast of the current state of the art in one's field, making projections based on current trends, determining learning and training needs, and selecting appropriate learning activities.

Performance Objectives are Optional

Performance Objectives are optional for all employees. If a rater/reviewer elects to represent a specific objective of a special non-recurring project nature to be accomplished during the rating period, this may be accomplished by adding an attachment to the Position Description and Performance Evaluation Form which must be signed and dated by the rater/supervisor, the reviewer, and the employee. If this action is taken, no more than 10 weighted points can be used for the objective. The difference in weighted points would be deducted from the essential functions in order to maintain an overall total of 100 weighted points. Each objective shall be rated in the evaluation stage based on the four levels of performance.

Checklist for the Position Description and Planning Document Process

- _____ The rater/supervisor, reviewing officer, and employee date and sign on page 1 only under "Planning Stage Acknowledgment."
- _____ Return the entire document to the Office of Human Resources by the specified date requested.
- _____ If you wish to change the Position Description portion of this document, please note on a separate sheet and attach to this document.
- _____ If you added an objective, remember to adjust the weighted points in essential functions.

EVALUATION DOCUMENT INSTRUCTIONS

(Below are the instructions for completing the performance appraisal during the evaluation period. You are requested to complete all sections of the form in INK OR WITH A TYPEWRITER.)

IV. Essential Job Functions of Position Description and V. Marginal Job Function of Position Description

- All functions which are listed are to be evaluated and a level of performance indicated – (S or 4) = Substantially Exceeds Performance Requirements; (E or 3) = Exceeds Performance Requirements; (M or 2) = Meets Performance Requirements; (B or 1) = Below Performance Requirements.
- Assign your performance level (1, 2, 3, or 4) to your weighted level of each of the Essential Functions or Marginal Function. Please note that the weighted points will total 95 for Essential Functions and 5 for the Marginal Function unless you have chosen more weighted points for Marginal Functions or have added an objective as an attachment to the Planning document for supervisory employees.

VI. Performance Characteristics

- The performance characteristic or characteristics are to be rated as an "A" for Acceptable or "U" for Unacceptable.

VII. Summary and Improvement Plan

- This section of the performance appraisal is for summarizing the employee's overall strengths and areas in need of improvement and for identifying steps, which the employee can take to improve present performance.
- Attach additional page(s) if needed; however, the additional page(s) must be signed and dated by the rater/supervisor, the reviewer, and the employee.

VIII. Appraisal Results

Note: If during the performance period an employee is considered "below performance requirements," in any job function or objective which significantly impacts performance, the rater/supervisor shall provide the employee with a "Written Warning Notice of Substandard Performance." The warning notice shall provide for an improvement period of no less than 30 days and no more than 120 days. The warning notice may be issued at any time during the review period. Ordinarily the warning period may not extend beyond the employee's review date. However, if the warning notice is issued less than 30 days before the employee's review date, the review date would roll forward a day for each day the warning notice is in effect. (Note: It is necessary to have an oral warning in the employee's file before issuing the written warning.)

- This section is to be completed on each employee in order to indicate overall rating.
- Following is a guide for completing this section and determining if the employee has an overall rating of Substantially Exceeds, Exceeds, Meets, or Below.

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SECTION IV – ESSENTIAL JOB FUNCTIONS

Functions	Performance Points (1, 2, 3, or 4)	X Weighted Points	= TOTAL
1.	4	35	140
2.	4	15	60
3.	4	15	60
4.	3	15	30
5.	3	10	30
6.	4	10	40
7.			
8.			
Total Weighted Points		95	375

SECTION V – MARGINAL JOB FUNCTION

1.	3	5	15
Total Weighted Points		5	

TOTAL OF ESSENTIAL & MARGINAL 100

OPTIONAL PERFORMANCE OBJECTIVE

1. Optional _____

GRAND TOTAL FOR ALL SECTIONS 100

$$\frac{375}{375} = \frac{100}{TOTAL} = 3.75^*$$

WEIGHTED POINTS

- The following is to be used in determining the overall rating:

Substantially Exceeds Performance Requirements (SE)	3.50 - 4.00
Exceeds Performance Requirements (ER)	2.50 - 3.49
Meets Performance Requirements (MR)	1.50 - 2.49
Below Performance Requirements (BR)	0 - 1.49

IX. Evaluation Stage Acknowledgment

- The evaluation process is now complete except for signatures in this section. This evaluation is to be signed and dated by the rater/supervisor, the reviewer, and then the employee is the last to sign. Return to the Office of Human Resources by the date indicated on the cover letter.
- Note: The reviewer has the authority to change the appraisal completed by the rater. If the reviewer elects to change the rating, the change and associated justification should be noted on the appraisal document, prior to the employee signing the evaluation.

FINAL CHECKLIST FOR THE EVALUATION PROCESS

- _____ Last page of evaluation document signed by the rater/supervisor, the reviewer, and the employee
- _____ The weighted points for Essential Functions, Marginal Function, and Objective (if added) total 100.
- _____ If additional pages were added, each page has been signed and dated by the rater/supervisor, the reviewer, and the employee.

**STATE OF SOUTH CAROLINA
FRANCIS MARION UNIVERSITY
POSITION DESCRIPTION/EMPLOYEE PERFORMANCE EVALUATION
FORM FOR CLASSIFIED EMPLOYEES**
(Combined Position Description/Planning Document/Evaluation Document for Non-Supervisory Employees)

Name _____	Performance Review from: January 4, 2016	Performance Review to: July 3, 2016
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State Title Systems Support Technician	Band/Level 5/1	Date Assigned to Current Position January 4, 2016	State Employment Date April 24, 2014
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I. PLANNING STAGE ACKNOWLEDGMENT
(Sign this section as your Planning Stage)

Rater/Supervisor: Nathan E. Flowers Date: 2/11/16
Mr. Nathan E. Flowers

Reviewing Officer: Joyce M. Durant Date: 2/11/16
Mrs. Joyce M. Durant

My Planning Stage and Combined Position description have been reviewed with me.
Employee: ~~_____~~ Date: 2/11/16

II. REQUIREMENTS AND SUPERVISORY RESPONSIBILITIES

1. What are the minimum requirements for the position? (Minimum requirements must at least meet the state minimum requirements but may include additional requirements.)

State Requirements: A high school diploma and experience in computer programming, computer operations, data computer science or electronics technology or a related field. An associate's degree in a related field may be substituted for the required work experience.
2. What knowledge, skills, and abilities are needed by an employee upon entry to this job, including any special certification or license?

FM Preferences: Bachelor's degree, preferred. High school diploma and experience in computer operations, data control, data coordination and the maintenance and repair of computers, required.
3. Describe the guidelines and supervision an employee receives in order to do this job, including the employee's independence and discretion.

Employee receives limited supervision and exercises discretion in dealing with students and other library patrons.

4. Additional comments regarding this position (e.g., work environment, physical requirements, overnight travel):
1. Must be able to communicate via telephone for incoming and outgoing calls and in person in order to give assistance and information to library users 100% of the time.
 2. Must be able to interpret handwritten and typewritten documents 100% of the time.
 3. Must be able to move heavy objects such as printers, PCs, and terminals 10% of the time.
 4. Must be able to adhere to a rigid schedule of arriving punctually daily to continue critical computer-generated programs that cannot be delayed 100% of the time.
 5. Must be able to operate and perform routine maintenance on specialized or technical equipment, some of which requires standing and standing on footstools 45% of the time.
 6. Must be able to troubleshoot and correct malfunctions of technical equipment 10% of the time.
 7. Must be able to work independently with limited supervision 30% of the time.
5. Position's Supervisory Responsibilities: N/A

III. JOB PURPOSE

Under the supervision of the Systems Librarian, maintains the Library's PCs, peripherals, and network devices; assists in customer technical support for public users of the Library's network; assists in library system support for Library and Media Center staff; assists in the operation and maintenance of the integrated library system; and processes reports and other printed output as needed. Performs related duties during the normal Monday through Friday work week.

IV. ESSENTIAL JOB FUNCTIONS OF POSITION DESCRIPTION
Performance Level = P (1,2,3,4); Weighted Level = W (Your weighted points will be 95)

#	Essential Job Functions and Success Criteria	P	W
1	<p>Essential Job Function: Assists in maintaining optimal operations of all staff and public PCs, peripherals and network devices. Assists in maintaining optimal network connection. Assists Systems Librarian in providing assistance to online system and network users, including public users in the Duke Energy Technology Center, and staff of the Library and the Media Center. Assists in maintaining microfilm equipment.</p> <p>Success Criteria: Troubleshoots and analyzes hardware and software problems. Performs routine maintenance and minor repairs on computers and peripheral equipment in the Library. Loads and configures software, as needed. Performs network maintenance. Assists in supervising student workers, including punctual publishing and posting of weekly student work schedules. Maintains basic knowledge of system-wide operations in order to assist in problem-solving and promotes open and positive communication between system users and the Systems Department.</p>	4	30
2	<p>Essential Job Function: Assists the operation and maintenance of the Library's integrated library system within a shared server environment comprised of five PASCAL Libraries.</p> <p>Success Criteria: On a daily basis, monitors the status of the system, the catalog database, circulation activities, OPAC transactions, acquisitions and serials status and weekly routes this information to the Systems Librarian and specified staff in other departments. Assists in updating the web catalog, troubleshooting and analyzing software problems related to all departmental library system functions/operations/services; in the absence of the Systems Librarian, reports problems to the PASCAL Technical Coordinator.</p>	4	15

3	<p>Essential Job Function: Assists Systems Librarian in managing student workers for the Duke Energy computer lab area.</p> <p>Success Criteria: Updates student worker schedules, assists with printer/PC questions raised by student workers, serves as front-line manager for all student worker functions in the absence of the Systems Librarian.</p>	3	5
4	<p>Essential Job Function: Assists Systems Librarian in formulating policies, priorities, and procedures concerning library technology, automated systems, and utilization of electronic services.</p> <p>Success Criteria: Advises Systems Librarian on issues in the area of technology, including purchases of hardware and software; researches and evaluates new technologies and trends pertinent for use in libraries; apprises Systems Librarian of technology needs within the library and recommends solutions; and assists in maintaining an inventory of library computer equipment.</p>	4	22
5	<p>Essential Job Function: Assists in maintaining and operating both hardware and software aspects of the Library's servers.</p> <p>Success Criteria: Upgrades and maintains the Ghost/Deep Freeze servers; creates and maintains Ghost images for public and staff PCs; deploys updated images on public PCs using Ghost software on a routine basis each semester and as otherwise instructed; deploys updated images on staff PCs as needed; updates Virtual Image configurations for public PCs as scheduled; and upgrades Ghost and Deep Freeze client software on PCs as needed; assists in performing daily backup routines and other server applications as needed on the Encore server.</p>	4	23
6	<p>Essential Job Function:</p> <p>Success Criteria:</p>		
7	<p>Essential Job Function:</p> <p>Success Criteria:</p>		
8	<p>Essential Job Function:</p> <p>Success Criteria:</p>		
TOTAL WEIGHTED POINTS FOR ESSENTIAL FUNCTIONS			95

V. MARGINAL JOB FUNCTIONS OF POSITION DESCRIPTION			
Performance Level = P (1,2,3,4); Weighted Level = W (Your weighted points will be 5) (5-10 weighted points may be used for this section; however, 5 weighted points are required)			
#	Marginal Job Function and Success Criteria	P	W
1	<p>Marginal Job Function: Organizes, maintains and replenishes supplies essential for the operation of the Systems Department. Supervises receipt of all materials ordered. Processes reports, forms, etc. as needed by the Systems Librarian. Performs related duties.</p> <p>Success Criteria: Uses time effectively and efficiently in accomplishing those tasks that are not required on a regular basis. Displays interest and enthusiasm in performing other related duties.</p>	4	5
TOTAL WEIGHTED POINTS FOR MARGINAL FUNCTION			5

VI. PERFORMANCE CHARACTERISTICS
(This section shall be rated as "A" Acceptable or "U" Unacceptable)

Additional characteristics may be chosen from the list provided in the instructions

#	Characteristics/Definition	A	U
1	<p>Characteristic: University/Department Team Effort</p> <p>Definition: Works with others in a cooperative effort; works well individually, with others and in a group setting; works as a part of a "team."</p>	X	
2	<p>Characteristic: Adaptability</p> <p>Definition: The extent to which the employee can adapt to job or organizational changes.</p>	X	
3	<p>Characteristic: Time Management</p> <p>Definition: Is prompt in reporting for work and effectively uses his/her time to accomplish his/her job tasks.</p>	X	

VII. SUMMARY AND IMPROVEMENT PLAN

Identify the employee's major accomplishments, areas needing improvement, and steps to improve present and future performance. Attach additional sheets if necessary. Initial and date all attachments.

~~...~~ commitment to detail and great attitude are a tremendous asset for FMU and Rogers Library. He consistently recommends good solutions to hardware and software problems, and he gets along extremely well with his coworkers. We are very fortunate to have him on our staff.

DUE EVERY MONDAY AT NOON!

TEMPORARY EMPLOYEE TIMESHEET

EMPLOYEE'S NAME Robyn D. Morgan

BUDGET NUMBER 1-035-E1498-0000 ?

WEEK ENDING 08/19/2017

DATES AND HOURS WORKED:

SUNDAY DATE: 8/13/17 # HOURS

MONDAY DATE: 8/14/17 # HOURS

TUESDAY DATE: 8/15/17 # HOURS

WEDNESDAY DATE: 8/16/17 # HOURS 5

THURSDAY DATE: 8/17/17 # HOURS 4

FRIDAY DATE: 8/18/2017 # HOURS 4

SATURDAY DATE: 8/19/2017 # HOURS 0

TOTAL HOURS 13

EMPLOYEE'S SIGNATURE Robyn Morgan DATE 08/18/2017

SUPERVISOR'S SIGNATURE D K Best DATE 8/21/2017