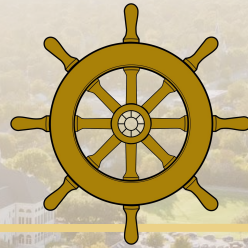




SOUTHWESTERN UNIVERSITY

STEER



Southwestern Tactical Evaluation for Employee Excellence and Results





Agenda

- Welcome to the STEER info session
- Overview of the session's objectives and goals
- Brief introduction to the STEER program
- Roles and responsibilities: The Importance of supervisor and employee involvement in the success of STEER
- STEER process and timing overview



Session Objectives and Goals

- Introduce the STEER process and form, emphasizing key updates and the rationale behind the changes.
- Define the roles and responsibilities of supervisors and employees to ensure active, meaningful participation in STEER.
- Outline the STEER timeline and key milestones to support confident, consistent engagement throughout the process.



What is STEER

- **Definition:** Southwestern Tactical Evaluation for Employee Excellence and Results (STEER).
- Puts the focus on employee development, continuous improvement, and actionable feedback.
- Key goals of STEER:
 - Creating alignment with organizational vision and objectives.
 - Supporting merit-based increases.
 - Encouraging continuous growth.



Why STEER

→ Why is the STEER program being introduced?

- ◆ Addressing performance management gaps.
- ◆ Fostering professional growth and development.
- ◆ Building a culture of timely feedback.
- ◆ Aligning individual goals, team objectives, and university objectives.

→ Benefits of STEER:

- ◆ Enhances clarity around expectations and goals setting.
- ◆ Promotes ongoing two-way dialogue between employees and supervisors that support growth, engagement, and year-round performance.
- ◆ Fosters consistent performance evaluations and feedback, creating a transparent process.



Key Features

- Structured evaluations with actionable feedback.
- Regular check-ins and performance discussions.
- Opportunities for career progression and skill development.
- Merit-based salary adjustments linked to performance. (Based on resources availability and approval.)
- Focus on professional development and collaboration.
- Shared responsibility model, where both supervisors and employees actively participate in the process.



STEER Process and Timeline Overview

- Step 1: Goal Setting & Performance Expectations (June - August)
 - Initial discussions with employees on setting SMART goals.
- Step 2: Regular Check-ins & Feedback (September - March)
 - Two (2) check-in meetings to assess progress and make adjustments if necessary.
- Step 3: Year-End Evaluations (April - May)
 - Review period: fiscal year (July 1st through June 30th).
 - Comprehensive review of performance and development.
 - Final feedback and recommendations for future growth.

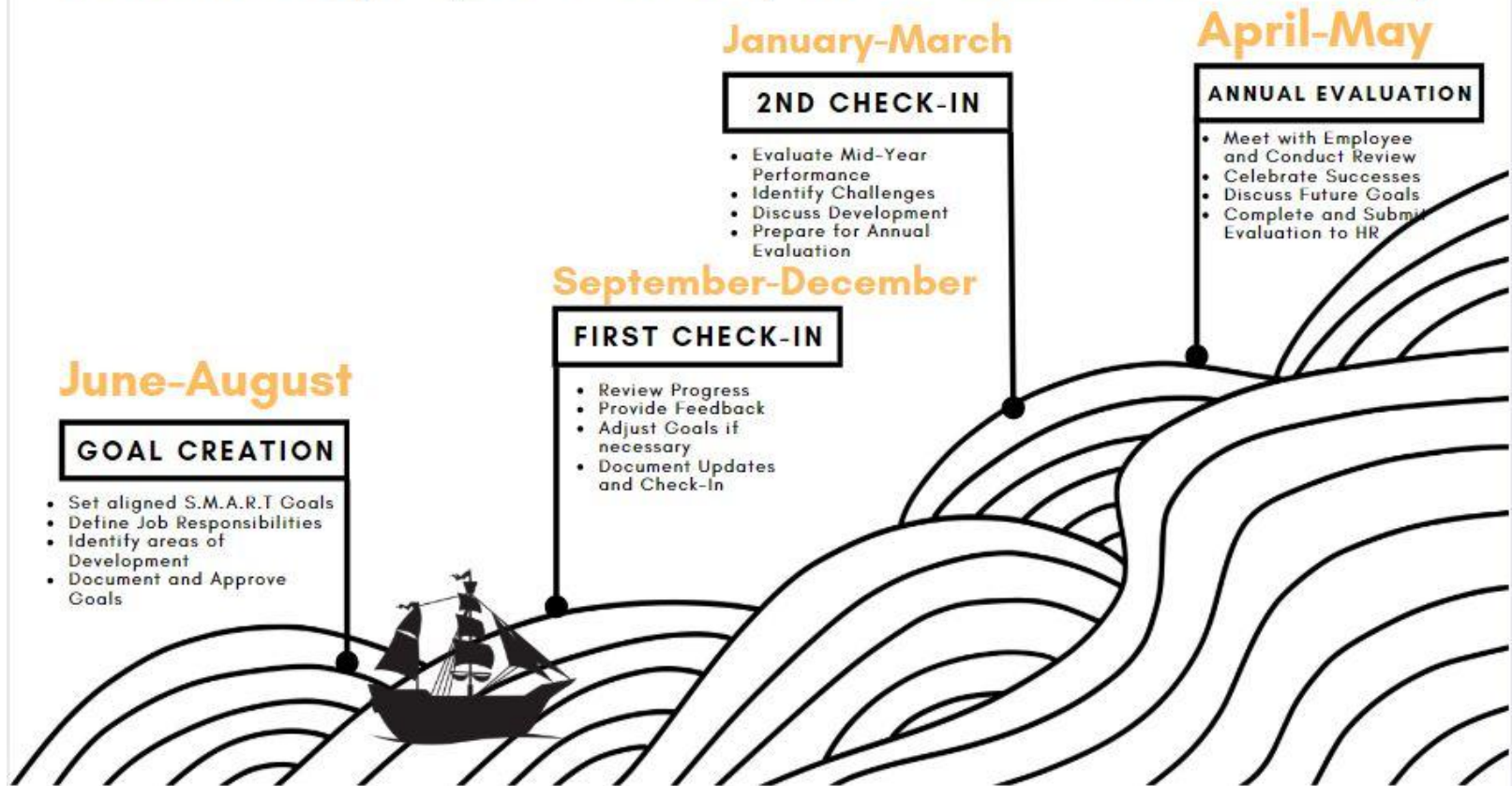


SOUTHWESTERN TACTICAL EVALUATION FOR EMPLOYEE EXCELLENCE AND RESULTS



S.T.E.E.R.

Annual Employee Development and Review Map





Goal Setting Process (June – August)

- Align on priorities.
- Draft SMART goals: Specific, Measurable, Achievable, Relevant, and Time-bound.
 - 3 to 4 professional goals: focus is on the University's objectives, tactical plan, department priorities, or team goals.
 - 1 to 2 developmental goals (encouraged but not required): focus is on the employee's growth in their role/career.
- Review, finalize, and document.



Check-in Meetings (September – March)

- 1st check-in September - December, 2nd check-in January March.
- Review progress and revisit goals.
- Exchange feedback.
- Adjust, document, and plan forward leading into the final review.



Year End Evaluation (April – May)

- Review and reflect on goals.
- Evaluate performance against operating principles.
- Provide final comments and feedback.



SOUTHWESTERN UNIVERSITY

S.T.E.E.R. ANNUAL PERFORMANCE REVIEW FORM STAFF FY25-26

Employee Name:	Manager Name:
	Department:

Performance and Developmental Goals At the start of the fiscal year, employees and supervisors should work together to establish professional goals that align with one or a combination of the following: the University's objectives, tactical plan, department priorities, team goals, or in addition to developmental goals that focus on the employee's growth in their role/career. Goals should be clear, specific, and follow the SMART methodology (Specific, Measurable, Achievable, Relevant, and Time-bound). Each employee should set three (3) to four (4) professional goals and one (1) to two (2) developmental goals.

1	
2	
3	
4	
5	
6	

Goals should be established collaboratively at the start of the fiscal year to guide performance and development. By signing and dating below, both parties confirm that these goals have been mutually developed and agreed upon by the employee and their supervisor. *Type name or hand sign, using adobe sign will lock form for future edits.

Employee Signature & Date:	
Supervisor Signature & Date:	

Performance and Coaching Check-Ins

1st Check-In: September-December

2nd Check-In: January-March

1st Check-In: The first check-in of the year is an opportunity for the employee and supervisor to review progress toward established goals, address any challenges, and adjust objectives as needed. During this check-in, the following should be discussed:

- Progress made on each goal since the start of the year.
- Any barriers or challenges encountered and potential solutions.
- Additional support, resources, or training may be required.
- Adjustments or updates to goals, if necessary, based on evolving priorities.

Comments should be specific, focusing on measurable achievements, constructive feedback, and actionable next steps. *Type name or hand sign, using adobe sign will lock form for future edits.

Employee Comments:

Employee Signature & Date:

Supervisor Comments:

Supervisor Signature & Date:

2nd Check-In: The mid-year check-in provides a comprehensive review of the employee's progress and performance to date. This stage allows for in-depth reflection and planning for the remainder of the year. The evaluation should include:

- A summary of accomplishments and milestones achieved thus far.
- Feedback on areas for improvement or opportunities for growth.
- Reassessment of goals to ensure alignment with department and institutional objectives.
- An evaluation of the employee's development in core competencies/job responsibilities and skills.
- Discussion of any additional support or changes needed to ensure continued success.

Comments should provide a balanced view, recognizing both strengths and areas for development, with an emphasis on fostering collaboration and future success. *Type name or hand sign, using adobe sign will lock form for future edits.

Employee Comments:

Employee Signature & Date:

Supervisor Comments:

Supervisor Signature & Date:



Annual Review Section and Final Check-In

Annual Evaluation Timeline: April-May

Annual Review Section: The annual review provides a thorough assessment of the employee's performance, achievements, and development throughout the review period. This section enables both the supervisor and the employee to share feedback, reflect on progress, and establish a foundation for future growth. Both parties should clearly and concisely document feedback to ensure alignment on performance and development plans. It also identifies areas for growth and improvement. Supervisors will assign ratings for each goal and an overall rating for the review period.

Supervisor Comments

- **Performance Summary:** Highlight key accomplishments, overall goal achievement, and notable contributions to the team or organization.
- **Strengths:** Acknowledge specific skills, competencies, and behaviors that contributed to success.
- **Opportunities for Growth:** Offer actionable feedback on areas needing improvement or development, along with clear guidance on how to achieve progress.
- **Future Focus:** Outline expectations and opportunities for the upcoming year, including suggestions for new goals or projects.

Employee Comments

- **Self-Reflection:** Provide an overview of achievements, challenges overcome, and contributions made throughout the year.
- **Feedback:** Share insights on areas where additional support or resources may be helpful.
- **Future Goals:** Express interest in opportunities for growth, training, or new responsibilities in the upcoming year.

Performance & Development Goals Review: (Previously agreed upon goals from the start of the year.)

Supervisor Rating:

1		Select
2		Select
3		Select
4		Select
5		Select
6		Select

Operating Principles: Rooted in the University's Mission, Purpose, and Values, these principles, developed by Human Resources, promote a respectful, collaborative workplace focused on growth, accountability, and alignment with institutional goals. Supervisors should assess employees' competencies and provide constructive feedback to foster improvement and engagement. By embracing these principles, we cultivate a workplace that values respect, teamwork, and shared success.

Operating Principles:

Supervisor Rating:

Communication: Open Communication across the university.	Select
Service and Quality Focused: Dedicated to high standards of Service & Quality Focus.	Select
Respectful: Treat others respectfully.	Select
Inclusion and Understanding: Seeks to understand, value, and promote different perspectives and experiences.	Select
Collaboration: Willing to collaborate with team and others.	Select
Integrity and Accountability: Act with honesty, transparency, and a commitment to ethical behavior.	Select
Innovation: Demonstrates an openness to new ideas and actively promotes creativity and innovation.	Select
Organization Awareness: Is knowledgeable about the organization and actively seeks to learn more.	Select
Stewardship: Good steward of organizational resources.	Select
Self-awareness and Continuous Learning: Is self-aware, understands strengths and weaknesses, and is willing to make improvements and take feedback.	Select

Employee Comments:

Supervisor Comments:

Overall Performance: Considering all aspects of performance, including development, core competencies/job responsibilities, and Operating Principles what is the overall performance rating? (Average is Auto-calculated)

Supervisor Overall Rating:

0

The University expects all employees to execute their job responsibilities in a manner that is both safe and ethical. This includes compliance with all applicable federal and state regulations, adherence to the University's Code of Conduct, and the completion of all mandatory training requirements.

- ☐ Please indicate your acknowledgment by checking this box, which confirms that the manager and employee have engaged in a discussion regarding compliance with these standards, as well as adherence to any additional mandatory standards that may pertain to the specific department or position.
- ☐ Check this box to signify employee's job description is up to date and discussed with them.

Manager Signature & Date:

Employee Signature & Date:

*Signatures indicate that this performance evaluation was discussed and reviewed with the employee. It does not necessarily indicate an employee's agreement.

*Once complete, this form should be submitted to the HR Office. (Submission details need to be worked out.)

**Performance Rating Scale**

Exceptional (5)	Often Exceeds Expectations (4)	Meets Expectations (3)	Below Expectations (2)	Unsatisfactory (1)
<p>Employees at this level consistently deliver extraordinary performance that significantly exceeds expectations. Their contributions demonstrate excellence in technical skills, ingenuity, creativity, and initiative. These employees serve as role models of university values and are relied upon by peers, supervisors, and higher management for their expertise and leadership.</p> <p>Examples:</p> <ul style="list-style-type: none"> Regularly exceed goals and deliver exceptional results on critical assignments. Volunteer for challenging projects and assume additional responsibilities beyond their role. 	<p>Employees at this level consistently perform above expectations, making significant contributions that positively impact the university. They exhibit initiative, set and achieve challenging professional goals, and consistently demonstrate a high degree of reliability.</p> <p>Examples:</p> <ul style="list-style-type: none"> Frequently exceed performance targets and provide value-added outcomes. Show initiative by driving process improvements and success. Serve as a trusted resource or advisor for colleagues and supervisors. 	<p>Employees at this level reliably meet all job expectations, demonstrating steady and consistent performance. They fulfill their responsibilities with minimal supervision, maintain quality and timeliness, and contribute to team goals.</p> <p>Examples:</p> <p>Achieve all assigned goals and complete tasks accurately and on time.</p> <p>Display a solid understanding of job requirements and execute tasks effectively.</p> <p>Maintain a positive and cooperative attitude while contributing to departmental success.</p>	<p>Performance at this level does not consistently meet job requirements. Employees in this category require development in key areas and more frequent supervisory intervention to fulfill their role effectively. Improvement is needed to meet position expectations.</p> <p>Examples:</p> <ul style="list-style-type: none"> Inconsistently meet deadlines or achieve performance targets. Require additional supervision to complete routine assignments. Display gaps in critical skills or knowledge needed for the role. 	<p>Employees at this level fail to meet job expectations in most critical areas of performance. Immediate and sustained improvement is required, and failure to improve may result in corrective or disciplinary actions. This rating should not be a surprise to the employee as any shortcoming should at least be addressed during the 1st and 2nd check-in. The review should be followed by a Performance Improvement Plan (PIP).</p> <p>Examples:</p> <ul style="list-style-type: none"> Consistently miss deadlines or fail to achieve key goals. Require constant supervision to complete basic tasks. Demonstrate a lack of competence or commitment to job responsibilities.



Roles and Responsibilities

All employees:

- Participate actively in training and development opportunities.
- Engage openly in feedback sessions and discussions.
- Identify and communicate your career goals and problems early.
- Commit to growth within the STEER framework.



Roles and Responsibilities

Supervisors' responsibilities:

- Main driver of the STEER process.
- Set clear expectations for employees.
- Provide consistent, constructive feedback.
- Monitor progress and offer support.
- Conduct performance reviews.
- Collaborate with HR to ensure alignment with institutional goals.
- Ensure timely completion of each section.



Employee Engagement Best Practices:

1. Take Ownership of Your Growth

- a. Regularly assess your strengths and areas for improvement.
- b. Set personal and professional goals aligned with the organization's objectives.

2. Prepare for Performance Discussions

- a. Document achievements, challenges, and feedback received.
- b. Be ready to discuss progress and future aspirations with your supervisor.

3. Be Open to Feedback

- a. Actively listen to constructive criticism.
- b. Ask for clarification when needed and focus on actionable steps.

4. Maintain Clear Communication

- a. Share updates on your progress and challenges with your manager.
- b. Express your needs for resources, support, or training.

5. Actively Seek Development Opportunities

- a. Participate in training, workshops, or mentoring programs.
- b. Volunteer for projects that expand your skills or role.

6. Stay Engaged and Positive

- a. Demonstrate accountability and a proactive attitude.
- b. Celebrate your accomplishments and acknowledge others' contributions.



Supervisor Best Practices

Tips for effective collaboration:

- Help employees make goals SMART (Specific, Measurable, Achievable, Relevant, Time-bound).
- Provide timely and constructive feedback with specific examples.
- Engage in two-way conversations during performance check-ins.
- Recognize achievements and addressing challenges.
- Ensure consistency and fairness in evaluations.



Tools & Resources

- HR Website: HR website will have STEER related resources and training materials.
 - Training Materials: Guides, workshops, and resources to support the process.
 - Timeline for Training: Key dates and deadlines for training and implementation.
- HR Support: is available for navigating STEER and addressing any challenges.



Common Challenges and Solutions

- **Challenge 1:** Aligning goals with organizational objectives.
 - **Solution:** Collaborate with supervisor and senior leadership for guidance.
- **Challenge 2:** Handling difficult feedback conversations.
 - **Solution:** Utilize HR resources for coaching and support.
- **Challenge 3:** Ensuring consistent feedback across teams.
 - **Solution:** Set regular check-ins and keep documentation of progress.



Recap of what's new and changing

- Setting goals at the beginning of the Fiscal year.
- Form and completion of form throughout the year.
- Year of review period from annual to fiscal year.
- Submission process to come end of the year.



Conclusion & Next Steps

- Encouragement to engage with HR for additional support.
- Keep an eye out for reminder and resources, upcoming training sessions, and deadlines.
- Thank you and commitment to employee development and growth.



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Q&A:

What questions do you still have?