Performance Review: The Supervisor’s Role

A Supervisor’s Guide to Setting Expectations, Reviewing Progress, and Providing Feedback

Current Rating Period:
March 1, 2018 – February 28, 2019
Welcome

- Introduction

Goal Challenge
- Share a goal that you defined for yourself and successfully met.
- Think of a goal that you identified but did not complete.
Objectives

• Define Performance Management
• Review the TU Performance Management cycle
• Introduce SMART goals and development plans
• Become familiar with writing and delivering useful feedback
• Learn how to conduct a performance review at TU
Important terms

**Performance Management**
- Ongoing cycle of goal-setting, feedback, and review
- Tracks/monitors individual’s progress towards goals

**Development Plan**
- Process of establishing training goals and action plans
- Links an individual’s goal attainment to career pathing and possible succession planning
Important terms (continued)

Coaching
• Ongoing process
• Used throughout the year
• Form of employee development

Counseling
• Viewed as a more formal approach
• Addresses specific performance issues
Why Performance Management?

• Supports mission and values of the university
• Provides a common focus for efforts and priorities
• Provides staff with a “roadmap” to meet goals
• Guides effective training and development strategies
• Improves overall “engagement” by providing purpose
• Helps employees feel more passionate and creative about their work
• Increases retention, decreases turnover
Reward and Recognize

- Growth and development…conferences, webinars, seminars, etc.…
- Leads on major projects
- Thank you notes…handwritten, emails
- Public recognition
- Anniversary milestones

*Check out 1501 Ways to Reward Employees by Bob Nelson*
Mission/Vision of University

• TU’s Mission/Vision - Dr. Kim Schatzel, President

• TU’s Values
  Individuality, Unity, Respect, Empowerment, Growth, Inspiration
Performance Review Process and Timeline

Review Period is March 1, 2018– Feb 28, 2019

- **Beginning of Cycle (Planning)**
  - March
  - Set Goals and Expectations

- **During the Cycle (Feedback)**
  - September
  - Mid-year Feedback Meeting

- **End of Cycle (Review)**
  - February
  - Supervisor’s Review
Beginning of Performance Cycle

- Review/Agree on job responsibilities
- Mutually set goals and expectations
- Create development plan
SMART Goals

- **Specific** – who, what, why, when, and where
- **Measurable** – decisive factors, such as amount, number, extent, quantity, quality, or frequency
- **Attainable** – challenging but realistic to achieve
- **Relevant** – links to essential tasks of position
- **Timely/Time bound** – establishes timeframe for completion and interim steps to monitor progress

See WB pgs. 2 - 6
Beginning of Performance Cycle

• Supervisor and employee discuss and agree on job duties, performance goals, and development plans

• Supervisor
  - provides a copy to employee
  - keeps a copy on file until end of cycle

See WB pgs. 7-8
During the Performance Cycle

- Review goals and provide feedback throughout the cycle
- Identify accomplishments
- Determine gaps in performance, including causes and resources for support
- Incorporate feedback from the employee
- Adjust goals if necessary
- Determine if a performance improvement plan (PIP) is necessary
End of Performance Cycle – Supervisor Prepares for Review

• Supervisor and Employee:
  - Review employee’s performance goals
  - Review employee’s current job duties
  - Compile thoughts and supporting materials on performance

• Participate actively in meeting
End of Performance Cycle: Supervisor’s Role

• Discuss goal progress/completion
• Determine development needs
• Mutually set goals for the coming year
• Complete performance review form with input from supervisor’s manager
• Review with employee … get feedback and signatures
• Send performance review form to HR
Who is Reviewed?

• Exempt employees who started on or before February 28, 2018
• Non-Exempt employees who started on or before August 31st, 2018
• Both regular and contingent II employees (exempt and non-exempt)
• Any employees who report to you
  - May involve previous supervisor if recent change
Common Rating Errors

- Contrast Effect
- First Impression
- Similar-to-me
- Halo/Horns Effect
- Negative/Positive Skew
- Recency Effect
- Stereotyping

See WB page 9
Helpful Hints: Be Clear and Specific

Too general: Good job.

Better: The year-end reports were very well written. The information was detailed, accurate, and organized. The reports you provided assisted the department in evaluating and prioritizing goals.
Provide useful, actionable feedback

Not useful:
The reports you provided did not meet my expectations.

Useful and actionable:
The reports you provided had many grammatical and punctuation errors, and lacked sufficient detail to explain the accomplishments of our project. This made our team appear unprepared and somewhat unprofessional. In the future, prepare the reports further in advance, ensure they are proofread by another person on our team, and approved by me before distributing outside of our team.
Be Sincere

**Insincere:** You’re the best. Your work is always top notch. No one could ever replace you. This department would be lost without you.

- **Better:** The reports you provided were of very high quality. I appreciate the attention to detail, organization, and coordination with others on campus. Your hard work was noticed and was extremely valuable in the department’s planning process.
Non-Exempt Review Form (Regular and Contingent II)

Performance Factors
• Customer Service
• Cooperation and Team Work
• Communication
• Attendance and Punctuality
• Quality of Work
• Quantity of Work
• Job Knowledge
• Supplementary, Performance, Factor/Project
Non-Exempt Review Form (Regular and Contingent II)

• Review employee’s performance based on work performed

• Complete Ratings Worksheet
  - Meets/Does not meet expectations for each factor
  - Comments – be specific, especially if does not meet rating is given

• Rate overall performance

• Identify a Development Plan
Exempt (Regular and Contingent II): Review Form

- Provide overall performance rating (meets/does not meet expectations)
- Review employee’s previous goal attainment and results
  - Provide written feedback in the results/attainment column
- Develop goals for the next cycle
  - Identify potential development needs and/or other opportunities
  - List goals and expectations for next rating period
  - Outline action plans
For all Reviews:

• Discuss review with next-level supervisor
  - BEFORE reviewing with employee
  - Revise document if needed

• By end of March, put performance review meeting on your calendar.
Conducting the Meeting

• Arrange private, comfortable space
• Initiate the conversation
• Solicit employee’s thoughts
• Provide clear, accurate, honest feedback
• Emphasis on accomplishment & development
• Jointly discuss, review, and complete areas for goals and further development
  - Include specific action plans and timelines
• Incorporate employee’s comments and feedback
• Have employee sign the form
When There is a Disagreement

• Refer to next level of supervision
• Consult with Human Resources
For all Reviews:

Obtain all required signatures and forward to: PerformanceReviews@towson.edu
Further resources:

• Workbook provided today

• TEC – SkillSoft online training

• Other in person workshops – to be announced!

• HR Partner

See WB page 10
2019 Timeline
Information, Dates & Contacts

• Review period
  • March 1, 2018 – February 28, 2019

• Performance Review Completion
  • March 11 – May 10, 2019

• Submit Performance reviews to
  PerformanceReviews@towson.edu no later than May 17, 2019
For Further Assistance

Organizational Development Specialist
Julie Jorczak 4-5133

HR Partners

Jen Stano 4-6013  Tara Richards 4-3386
Robbi Hairston-Flood 4-6016  Esty Goodman 4-5144