LEAD

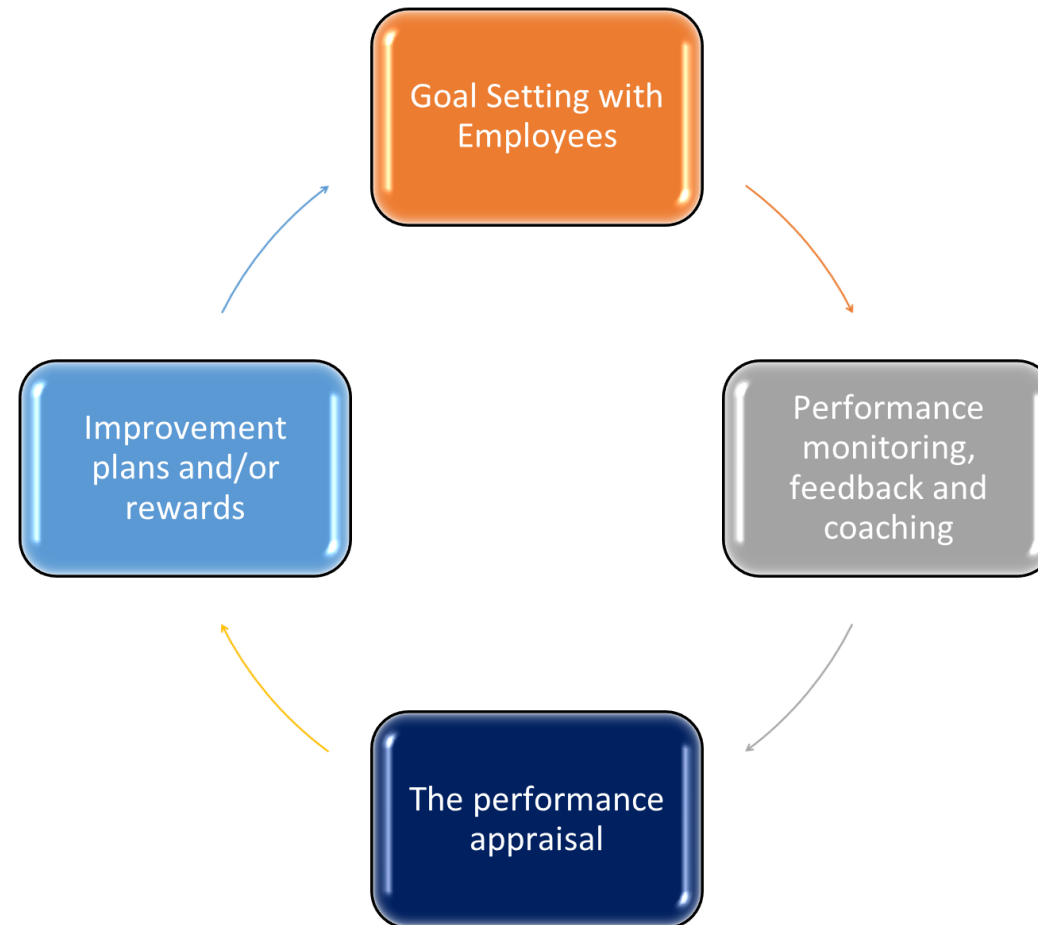**LEADERSHIP.**
EXCELLENCE.
AGILITY.
DISCOVERY.

QUADRENNIAL TRAINING
2025

Performance Evaluation Responsibilities

Performance Management

Performance Management
Continuum

Goal Setting with Employees

Performance monitoring, feedback and coaching

The performance appraisal

Improvement plans and/or rewards

Performance Management Preparation

Performance Management
Preparation is Key

- **Performance Tool:** Determine which type of performance tool you will use.

- **Use Performance Management Tools:** Streamline the process with tracking goals and feedback.

- **Standardize Forms:** Create templates for consistency and efficiency.

- **Analyze Trends:** Utilize analytics to identify performance patterns and areas for improvement.

Performance Management

Preparation is Key

- **Gather Relevant Data:** Collect performance metrics, project outcomes, peer feedback, and self-assessments.

- **Review Past Goals:** Assess progress against previously set objectives and identify achievements and gaps.

- **Develop Future Goals:** In collaboration with staff, develop goals for end of year rating period.

Goal Setting

Competencies Vs. Goals

Sub header.

Competencies

- Characteristics, attributes, or skills that are exhibited by an individual in their job role.
  - Can apply to many individuals across multiple departments

Goals

- Set by an employee and his/her manager to be achieved during the evaluation period.
  - Specific to a particular role or department

Competencies

Examples

External Awareness

Having the ability to put things in context and think broadly. Involves consideration and understanding of future business needs.

Change Management

The ability to demonstrate support for innovation and for organizational changes needed.

People Development

Having the ability to assess skill strengths and weaknesses of individuals and teams.

Analytical Thinking

Understanding a situation by breaking it into parts, studying a problem in a systematic way.

Goal Setting

Critical steps should occur when conducting a goal setting session.

Review Organizational Mission to Prepare for the Session
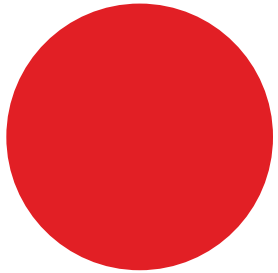
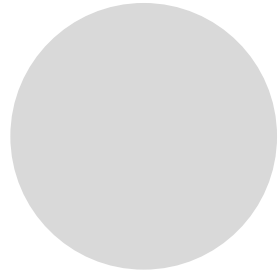**Ensure Meaningful Goals**

Ensure that SMART Goals are Set
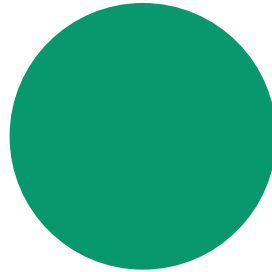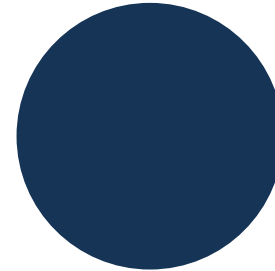
Goal Setting

SMART Goal Criteria

Specific
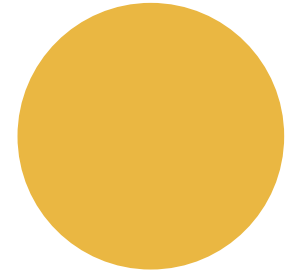
Measurable

Achievable

Relevant

Time-Bound

Goal Setting
Specific

- What exactly do I want to achieve?

- How?

- When?

- Why do I want to reach this goal?

Goal Setting

Measurable

- Identify exactly what it is that will occur when you reach your goal.

- Can be useful is setting milestones for goal completion.

Goal Setting

Achievable

- Is this goal reasonable within the set timeframe?

- Consider the resources and skills that are available in completing the goal.

Goal Setting

Relevant

- Does this goal pertain to the goals of the conference?

- Is this related to the position or department?

Goal Setting
Time-Bound

- When is this goal expected to be completed?

- Are there smaller deadlines that need to be set?

Goal Setting

Setting Standards

- Define and establish specific goals/objectives for the review period.

- Create mutually agreed time lines of break out data for progress reports on goals and objectives.

- Communicate changes or redirection of goals and objectives in a timely manner.

Completing the Performance Review

Completing the Performance Review

Ongoing Communication

- Recognize performance management is a continuing process to assist everyone in enhancing performance and development.

- Establish milestone dates for periodic monitoring of performance objectives and progress reports in objective terms.

- Be aware of the potential and, when necessary, take corrective action, if goals/objectives need to be changed or re-targeted during the review period.

Completing the Performance Review

Ongoing Communication

- Maintain open communication channels to ensure that issues are elevated quickly and resolved expeditiously.

- Coach, assist, and/or re-direct employees who request assistance and those who are failing to meet standards.

Completing the Performance Review

Best Practices

1. Employee will complete self-evaluation and send to manager, who will then enter their ratings.

2. Employee and supervisor should review each others forms prior to meeting.

3. Hold performance review meeting:

    • Let the employee speak first and give their input.

    • Respond with your own input.

    • Discuss areas where you disagree.

    • Avoid terms like "always", "never", etc.

    • Come to terms on actions, when possible.

Completing the Performance Review

1-4 Rating Scale
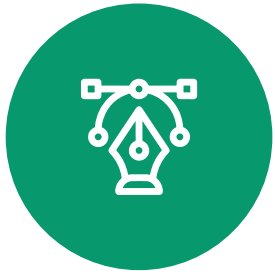
01

Below Expectations

02

Meet Expectations

03

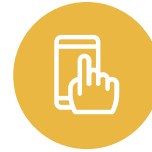**Exceeds Expectations**

04

Exceptional

Rating Criteria
Below Expectations

Fails to perform aspects of the goal or competency.
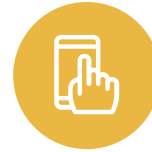
Performance levels are below expectations.

Requires consistent or close guidance in performing routine job duties.

Rating Criteria

Meet Expectations

Meets performance standards.

Competently performs all aspects of job functions and meets goals.
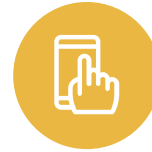
Capably adjusts to changing workplace needs and work requirements.

Rating Criteria

Exceeds Expectations

The objectives were met in a way that exceeded the plan.

Continuously contributes to the organization's success by adding value.

Demonstrates a comprehensive understanding of work, proactively identifies needs and issues.
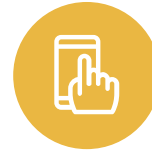
Rating Criteria
Exceptional

Objectives were met and far surpassed.

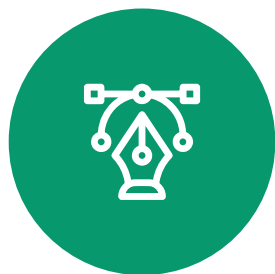Continuously contributes to the organization's success by adding significant value.

Demonstrates a comprehensive understanding of work; takes initiative to identify needs and solve problems.

Completing the Performance Review

Rating Perils

- **Constancy** – rate employees via rank order

01

02

03

04

Completing the Performance Review

Rating Perils

- **Halo/Horn Effect** – rate employees the same on every trait based on a previous experience.

- **Central Tendency** – lack of rating differentiation between employees.

- **Leniency** – avoids honest ratings to avoid conflict.

- **Recency** – narrow focus on recent events.

- **Similarity/Like me** – favorable rating to employees who have similar values or interests to the rater.

- **Constancy** – rate employees via rank order.

Completing the Performance Review

Avoiding Other Rating Perils

- Make objective statements.

- Inadequate record keeping – lack of specific examples.

- Lack of establishing milestones for progress reviews.

- Legal impact of inflated performance ratings.

- Specific comments should avoid any connotations which are connected to: age, race, sex, religion, national origin, veteran, or a specific disability

Performance Management Meeting

Very Important!

Nothing should be surprising to the employee during the performance review.

Performance Management

Planning the Review

Advance planning – self appraisals should be completed prior to managerial review.

Plan for open dialogue – opportunity to review performance, consider lessons learned, progress for period, and establish goals and objectives for next period.

Lay out plan for performance discussions – collect and review notes, statistics, citations and performance-based examples.

Schedule sufficient time to focus on the review.

Performance Management

Respect confidentiality of the review discussion when possible. If unlimited confidentiality cannot be promised, advise employee accordingly.

No cell phones, no emails, no text messaging, no electronic devices, no interruptions.

Job description/addendums should tie together with performance management.

Handle dissent professionally – disagreements should be noted as a matter of record.

Performance Management
Difficult Evaluations

- Describe unsatisfactory performance/behavior.

- Cite specific observed examples – past incidents or lack of meeting goals and impact on employee, team, customer, department, et al.

- Solicit constructive employee action plan to resolve or ameliorate the performance failures or behavioral issue.

- Review action plan and establish milestone date(s) to review progress.

Thank you!

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LEAD

LEADERSHIP.
EXCELLENCE.
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