



WHITMAN COLLEGE

Reimagining Performance Management

SUPERVISOR TRAINING

March 2022

Today's goals

- The value of effective performance management
- 3 components of performance management
- Writing and delivering high quality performance reviews
- Whitman's new performance management model
- Timeline of performance management process
- Using BambooHR for performance management



Performance Management is a **PROCESS**, that:



- Involves **communication** between a supervisor and an employee
- Is **ongoing**
- Ensures the work we do is **in support of accomplishing** the goals of our department
- Helps employees fulfill their **potential**



The dreaded annual performance review

- It takes time & effort.
- They are often overly complicated.
- “Formal” feedback can be scary and anxiety-producing.
- It is frequently out of context because of lag time.
- Often supervisors don’t feel like they can prioritize performance management.



Annual reviews are losing relevance

- Fewer organizations are using annual reviews:
 - 2016: 82%
 - 2017: 65%
 - 2018: 58%
 - 2019: 54%
- Effective feedback is:
 - timely,
 - frequent, and
 - a continuous process
 - that engages employees.



Good performance management adds tremendous value

- Strengthens an organization's culture & reinforces values.
- Helps satisfy employees desire to grow & develop.
- Improves communication between employee & supervisor.
- Aligns an individual's work with the team and the organization.
- Shows supervisors care about employees and appreciate them.



3 components of effective performance management

1. Departmental core values & priorities that drive our work
2. Assessing performance
 - Performance assessment
 - Feedback from others
 - Ongoing conversations between supervisors and employees
3. Goal setting



Departmental core values & priorities

- Values should serve as our guiding compass for every employee's work.
- Supervisors must define, discuss often, & model how our work and job functions live out the department's core values.
- All work must align with values.



Assessing performance

(1) ASSESSMENTS

- Employee self-assessment
- Assessment by supervisor

(2) FEEDBACK FROM OTHERS



What should assessments measure?

PERFORMANCE

- Measures where someone has been and where they currently are.

ENGAGEMENT

- Understanding engagement helps make sense of the future.



Writing an effective performance assessment

- Make sure you are in the right time & mental space to write the review.
- Embrace that the best assessments are the simplest.
- Give positive feedback first.
- Be very specific & offer concrete examples.
- Consider how to frame each set of feedback – evaluating, appreciating and coaching.
- As you review the assessment, ask yourself if you have created any surprises.



Writing an effective performance assessment

REVIEW & CHECK FOR BIAS



- Do not use assumptions or judgements.
- Run a consistency check.
- Give yourself a word range.
- Is my feedback related to performance or is it personality-based?
- How might this feedback be shaped by my own culture and background?



Effectively delivering a performance review

- Be prepared & communicate expectations.
- Remind yourself:
 - Feedback involves care and trust.
 - Delivering an effective performance appraisal can lead an employee to feeling listened to and supported.
- Make it conversational & start with the employee.
- Timing is everything.



Effectively delivering a performance review

- Show genuine gratitude.
- When providing constructive criticism, focus on the issue and use this as an opportunity to collectively problem-solve.
- Seek first to understand, then to be understood, and recognize that you might be wrong!



Effectively delivering a performance review

- Don't hesitate to pause and reconvene.
- Be prepared that the possibility exists for an employee to not receive constructive feedback well.
- Invite the employee to raise any final items.
- Summarize, express confidence, and document.



Feedback

- Feedback from others creates the opportunity to put together the whole picture.
 - Team members
 - Peers
 - Supervisees
- It is important for feedback to be given anonymously.



Setting goals

- Goals should be established collectively.
- Make sure goals align with core values, priorities, and areas that need improvement in performance and/or engagement.
- Find ways for goals to leverage employee strengths & talents.
- Document.



Setting goals

Make sure goals are SMART:

- Specific
- Measurable
- Attainable
- Relevant
- Time bound



Whitman's new performance management model

1. Assessment
 - Self-assessment
 - Supervisor assessment
2. Performance review conversation
3. Feedback invitation
 - Feedback from 1-10 other employees (make sure to include employees of supervisors)
4. Goal-setting
5. Ongoing one-on-one conversations to share peer feedback & monitor performance, engagement, and goal progress.
6. Repeat (every 4 months).



Timeline

- Apr. 1: Assessments go live
- Apr. 1 – Apr. 30: BambooHR sends email reminders
- May 1: Assessments close
- Month of May: Performance review conversations
- May 16 – May 29: Supervisors will be prompted to invite feedback
- May 16 – June 12: Employees provide feedback of others
- June & July: Continue working peer feedback & goal monitoring into regular one-on-one meetings
- July: Gather feedback
- Aug. 1: The process begins again!

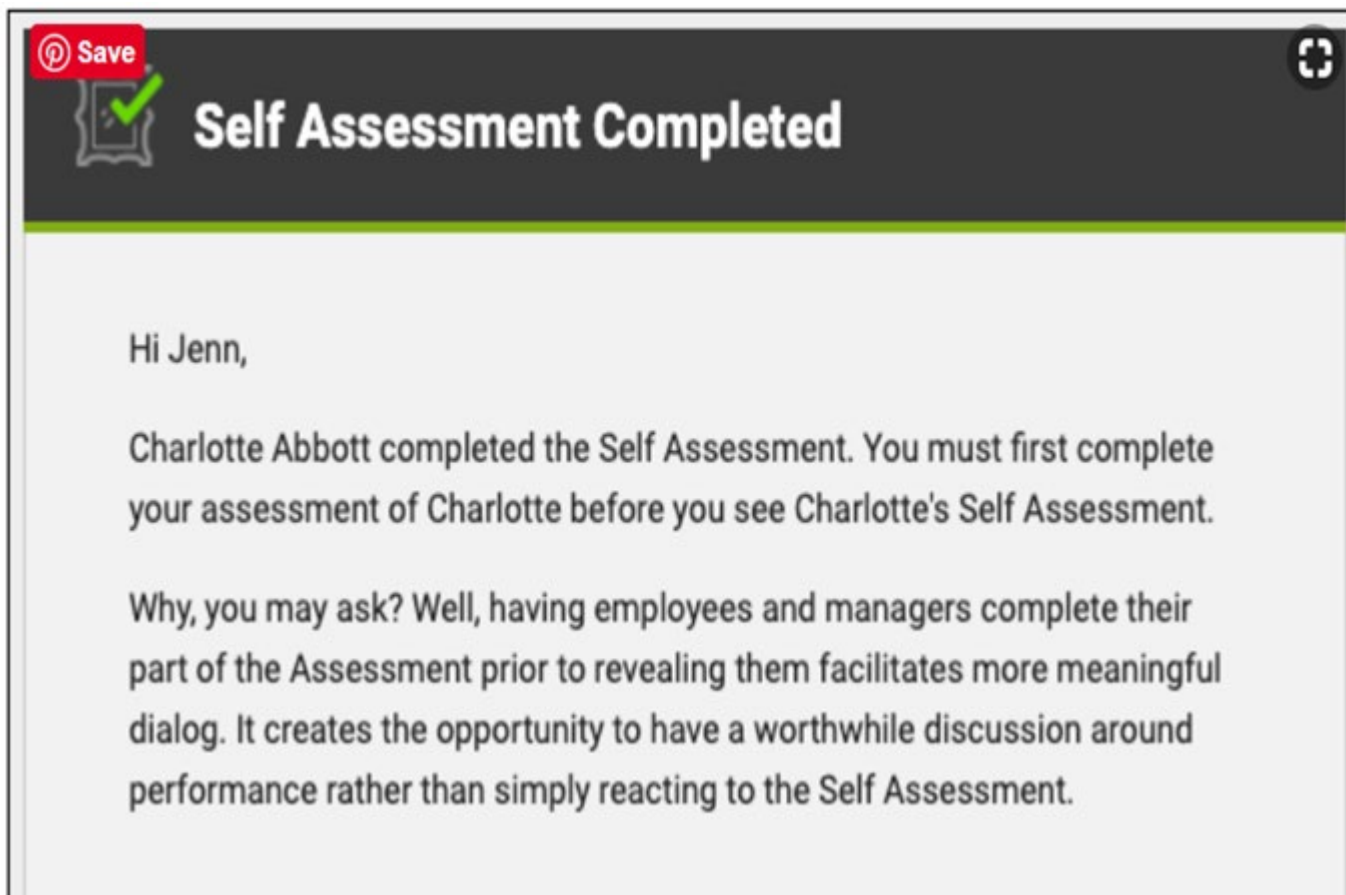


Self-assessment

The screenshot displays a performance management system interface. On the left is a sidebar with contact information (415-555-1273 Ext.1272, 415-555-8964), hire date (Jul 17, 2014), full-time status, and manager information (Jenn Caldwell). The main content area is titled 'Performance' and includes a 'Goals' tab and an 'Assessment' tab (highlighted with an orange box). A 'Review Period' dropdown is set to 'Jun 16, 2018 - Sep 15, 2...'. The 'Self Assessment' section contains three questions with dropdown menus: 'How well does Helpcontent recognize my value?' (selected: 'I feel I am highly valued.'), 'What would have the greatest impact on my ability to do my best work more often?' (selected: 'Nothing, I have all I need.'), and 'What are some things I do well?' (selected: 'I am great at seeing the big picture and at delegating work to my team.'). A fourth question, 'How could I improve?', has a text input field with the text 'Make sure I am fully understanding the feedback from my peers and team to ensure I am doing my best work.' and a green checkmark icon. At the bottom are 'Submit' and 'Save & Finish Later' buttons. The 'Manager Assessment' section on the right shows a compass icon and the text 'Manager Assessment will show here once completed.'



Self-assessment



The screenshot shows an email notification with a dark grey header. In the top left corner of the header is a red 'Save' button with a white pin icon. To its right is a green checkmark icon inside a white square. The main title of the header is 'Self Assessment Completed' in white text. In the top right corner of the header is a white refresh icon. The body of the email is white and contains the following text:

Hi Jenn,

Charlotte Abbott completed the Self Assessment. You must first complete your assessment of Charlotte before you see Charlotte's Self Assessment.

Why, you may ask? Well, having employees and managers complete their part of the Assessment prior to revealing them facilitates more meaningful dialog. It creates the opportunity to have a worthwhile discussion around performance rather than simply reacting to the Self Assessment.



Supervisor assessment

The screenshot displays a performance management system interface. On the left is a sidebar with contact information (415-555-1273 Ext. 1272, 415-555-8964), a hire date of Jan 14, 2020, and a manager profile for Jenn Caldwell, VP of People. The main content area is titled 'Performance' and includes tabs for 'Goals', 'Feedback', and 'Assessment' (the latter is highlighted with an orange box). A 'Review Period' dropdown is set to 'Oct 2, 2019 - Nov 30, 20...'. Below the tabs, a 'Self Assessment' card is shown as locked with a padlock icon and the text 'Complete the Manager Assessment to unlock this Self Assessment.' To the right, a 'Manager Assessment' card is active, containing several questions and text boxes. The questions include: 'If Charlotte got a job offer elsewhere, I would...', 'How engaged is Charlotte at work?', 'What are some things Charlotte does well?', and 'How could Charlotte improve?'. The text boxes contain responses such as 'Do everything I could to keep Charlotte. We'd b...', 'Good engagement and a mostly positive attitude.', 'Charlotte is great at managing her team. She is really focused on getting her job done, and improving the work life of employees at her location.', and 'Sometimes Charlotte is te for work. This adds unneeded stress to her day as she is very busy.' A 'Submit' button (highlighted with an orange box) is at the bottom, with a 'Saved (7 days left)' indicator.



Feedback from others

The screenshot shows the BambooHR interface. At the top, the navigation bar includes 'bamboohr™', 'Home', 'My Info', 'People', 'Hiring', 'Reports', and 'Files'. A notification icon shows 25 alerts. The main header is 'Requests' with a 'Feedback' breadcrumb and '1 of 1' page indicator.

On the left sidebar, under 'Inbox (25)', there are categories: 'Approvals (20)', 'Timesheets (20)', 'Signatures (3)', 'Onboarding (1)', and 'Feedback (1)'. The 'Feedback (1)' item is highlighted with an orange box. Below this are 'Completed' and 'Sent' sections.

The main content area is titled 'Select people to provide feedback on your team' with a 'Due in 15 Days' warning. A central card titled 'Get Feedback about Your Team' contains the following text:

Hi Olivia,



Please select people to provide feedback on members of your team. You will be able to see the feedback once it's completed.

Remember:

- Your team members WILL NOT be able to see the feedback.
- You can always request more feedback (up to 10) from the employee's profile page.

Act now, before it's too late... Requests must be sent by Jul 31.

Below the text is a table with two columns: 'Employee' and 'Get Feedback from...'. Two rows are visible:

Employee	Get Feedback from...
 Jake Ryan VP Learning and Development Lindon, Utah	← <input type="text" value="Search Employees"/> ↻
 Dorothy Chou Chief Financial Officer Lindon, Utah	← <input type="text" value="Search Employees"/> ↻

At the bottom of the card are two buttons: 'Send Feedback Requests' (green) and 'Dismiss Request' (blue).

Feedback from others

The screenshot shows a web interface for 'Requests'. On the left is a sidebar with categories: 'Inbox (8)', 'Approvals (2)', 'Timesheets (2)', 'Signatures (1)', 'Feedback (1)', 'Completed', and 'Sent'. The 'Feedback (1)' item is highlighted with an orange box. The main content area is titled 'Please provide feedback about Daniel Vance' with a 'Due in 15 Days' warning. Below this is a form titled 'Please Provide Feedback about Daniel'. The form includes a greeting 'Hi Charlotte,' and a request for feedback on Daniel Vance. A red warning icon indicates a deadline: 'Limited time only... This Feedback must be completed by Feb 8.' The profile of Daniel Vance is shown as 'VP of Sales' in 'Lindon, Utah'. A yellow warning box states 'Daniel WILL NOT see this feedback.' The form has two text input fields: 'What are some things Daniel does well? *' and 'How could Daniel improve? *'. A 'Submit Feedback' button is at the bottom, highlighted with an orange box.



Feedback from others

The screenshot displays a performance review interface. On the left is a sidebar with contact information (415-555-1273 Ext. 1272, 415-555-8964), hire date (Mar 13, 2020), and manager (Jenn Caldwell, VP of People). The main area is titled 'Performance' and includes tabs for 'Goals', 'Feedback', and 'Assessment'. A date range '01/01/2019 - 01/29/2021' is highlighted with an orange box. A notification states 'Just so you know, Feedback is hidden from Charlotte.' Below this is a prompt 'It's time to request feedback about Charlotte' with a dropdown menu set to '-Select-' and a 'Send Request' button. The feedback section shows a comment from Olivia Sterling, Founder and CEO, dated Dec 26, 2019 at 9:22 AM. The feedback includes two sections: 'What are some things Charlotte does well?' and 'How could Charlotte improve?'. The 'What are some things Charlotte does well?' section contains the text: 'Charlotte is very professional and does a great job of forming relationships with employees. You can tell employees really trust her and feel comfortable going to her when an issue comes up.' The 'How could Charlotte improve?' section contains the text: 'Charlotte has a hard time delegating tasks, which can sometimes bring on unnecessary stress. She could work harder to evenly distribute the work and work more collaboratively as a team.'



Goal setting

415-555-1273 Ext. 1272
415-555-8964

Hire Date
Mar 13, 2020
1y - 1m - 7d

1
Part-Time
Human Resources
North America
Castle Rock

Manager
 Jenn Caldwell
VP of People

Performance

Goals Feedback Assessment

[+ New Goal](#) Status **In Progress**

Increase retention by 5% before the end of Q1

Aligns with: Review Performance results and share with the C-Suite
Research trends in terminations and deep dive into ways we can improve.


Mar 31


Olivia Sterling
Jan 23, 2020 at 10:25 AM
Can you please give me an update on this by the end of January?

[+ Add Comment](#)




Goal setting

 Add a New Goal

Your New Goal mm/dd/yyyy* 

Short description of what you will accomplish and how.

-Goal Alignment- (Optional) 



Goal setting

415-555-1273 Ext. 1272
415-555-8964

Hire Date
Mar 13, 2020
1y - 1m - 7d

1
Part-Time
Human Resources
North America
Castle Rock

Manager
Jenn Caldwell
VP of People

Performance

Goals Feedback Assessment

+ New Goal

Status In Progress

Increase retention by 5% before the end of Q1

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Olivia Sterling
Jan 23, 2020 at 10:25 AM

Can you please give me an update on this by the end of January?

+ Add Comment



Helpful resources

[BambooHR Guides](#): Whitman/edu/human-resources (under Hiring Managers & Supervisors)

Blanche, A. (2020). [Why Inclusivity Needs to be the Backbone of Performance Reviews](#). Talent Management and HR.

Davis, June Y. (2021). [Strategies for More Inclusive and Effective Feedback](#). SHRM.

Mackenzie, Lori N., Wehner, JoAnne, and Correll, Shelley J. (2019). [Why Most Performance Evaluations are Biased and How to Fix Them](#). Harvard Business Review.

Mueller-Hanson, Rose A. & Pulakos, Elaine D. (2015). [Putting the “Performance” Back in Performance Management](#). SHRM.

O’Connell, Brian. (2020) [Performance Management Evolves](#). SHRM.

