



WHITMAN COLLEGE

COMPLETING THE MANAGER ASSESSMENT Performance Reviews

The performance review process

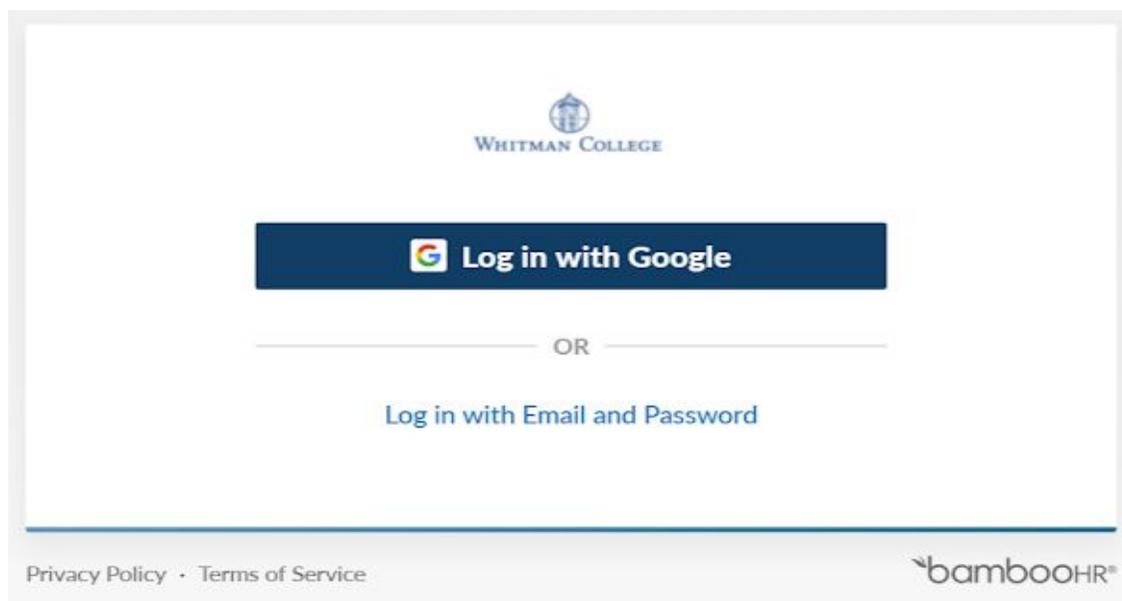
The performance review process consists of two components - goal setting and bi-directional assessments.

1. Goal setting is intended to be fluid, and staff can create goals in BambooHR at any time. Supervisors should give guidance to your staff on if, how and when you would like them to enter their goals. You may prefer to invite your staff to create goals for the coming year and enter them in BambooHR prior to your performance review conversation. Alternatively, you may ask your staff to enter their goals after you discuss them during the performance review conversation. Regardless of the timing, staff can enter, edit and update goals at any time.
2. The assessment process involves two components, the self-assessment that allows staff the opportunity to reflect on their performance, and the manager assessment. Both assessments are available on March 16 and should be submitted by April 15.

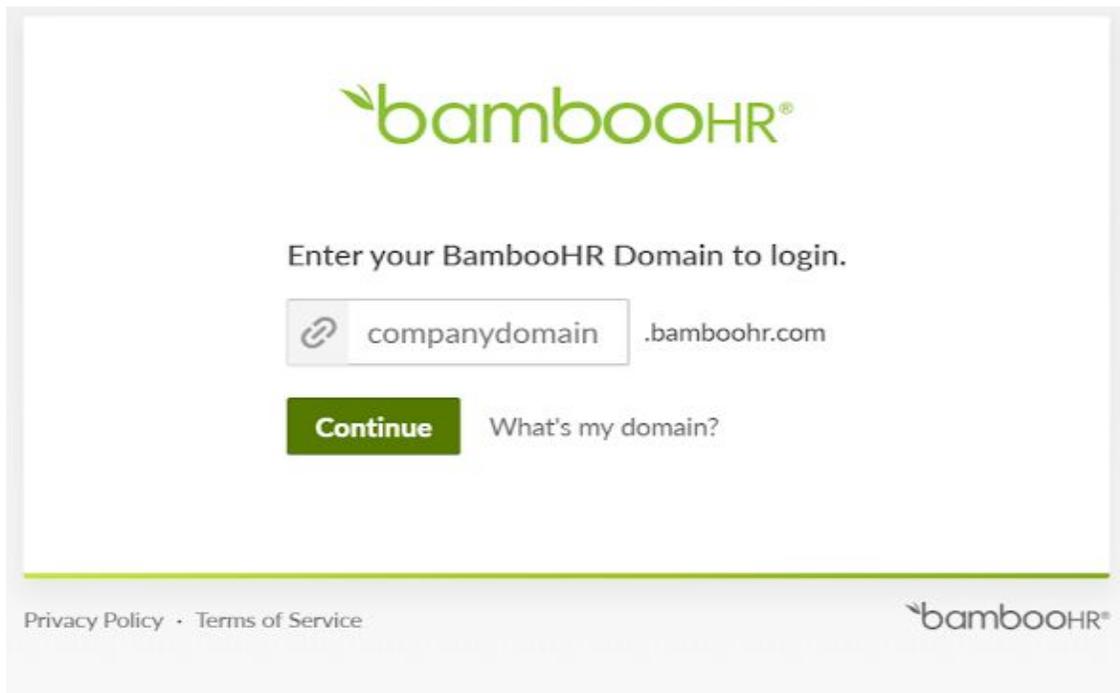
Logging in to BambooHR.

Manager assessments are completed in BambooHR. BambooHR can easily be located at my.Whitman.edu under *Staff Toolbox*.

Click on *Log in with Google*.



When logging in to BambooHR, you will be prompted to enter *companydomain*. Enter *Whitman*.

The image shows a screenshot of the BambooHR login interface. At the top center is the BambooHR logo in green. Below it, the text "Enter your BambooHR Domain to login." is displayed. A text input field contains the placeholder text "companydomain" followed by ".bamboohr.com". To the left of the input field is a small chain-link icon. Below the input field is a green "Continue" button. To the right of the button is a link that says "What's my domain?". At the bottom left, there are links for "Privacy Policy" and "Terms of Service". At the bottom right is the BambooHR logo again.

Completing the Manager Assessment

When you enter BambooHR, scroll down to *Direct Reports* on the lefthand side under your profile picture. Click on the name of one of your staff members to get to the manager assessment.

Once you are in your a staff member's screen, tab over to *Performance*. Then click on *Assessment*. On March 16, the manager assessment will be available for you to complete.

In the manager assessment, you will respond to four questions created by BambooHR about your staff's work performance.

1. *If this employee got a job offer elsewhere, I would...*
 - A. *Do everything I could to keep them. We'd be in trouble.*
 - B. *Convince them to stay. They would be difficult to replace.*
 - C. *Wish them well. I'll be able to find a better replacement pretty easily.*
 - D. *Be relieved. It's not likely to work out anyways.*

2. *How engaged is this employee at work?*
 - A. High engagement & great attitude
 - B. Good engagement & a mostly positive attitude
 - C. Medium engagement & an OK attitude
 - D. Low engagement & is burned out
 - E. No engagement & is checked out

3. *What are some things this employee does well?*

4. *How could this employee improve?*

The screenshot shows a performance assessment interface for Charlotte Danielle Abbott, Sr. HR Administrator. The interface is divided into several sections:

- Header:** Charlotte Danielle Abbott, Sr. HR Administrator. Navigation tabs include Personal, Job, Timesheet, Emergency, Performance (selected), Notes, Onboarding, and More.
- Performance Section:** Includes Goals, Peer Feedback, and Assessment (selected). A review period is shown as Dec 29, 2018 - Feb 8, 2019, with 10 days left.
- Self Assessment:** Completed on Jan 29, 2019 at 9:12 AM. It is currently locked with a padlock icon and a message: "Complete the Manager Assessment to unlock this Self Assessment."
- Manager Assessment:**
 - Questions Charlotte WILL NOT SEE:**
 - "If Charlotte got a job offer elsewhere, I would..." with a dropdown menu showing "Do everything I could to keep Charlotte..."
 - "How engaged is Charlotte at work?" with a dropdown menu showing "Good engagement and a mostly positive..."
 - Questions Charlotte WILL SEE:**
 - "What are some things Charlotte does well?*" with a text box containing: "Charlotte is great at managing her team. She is really focused on getting the job done, and improving the work life of employees at her location."
 - "How could Charlotte improve?*" with a text box containing: "Sometimes Charlotte is late for work. This adds unneeded stress to her day as she is very busy."
- Buttons:** "Submit" and "Save & Finish Later".

Your staff will only receive your responses to questions #3 and #4 as questions #1 and #2 are intended for your purposes. Your responses to questions #1 and #2 can be used to look for misalignment with questions #1 and #2 that staff answer in the self-assessment - *How well does Whitman recognize my value?* and *What would have the greatest impact on my ability to do my best work more often?*

A misalignment is when a supervisor's perception of a staff member's value and/or engagement does not align with the staff member's perception of how they are valued by Whitman. If a misalignment occurs, this is a great opportunity for you and your staff member to have a thoughtful discussion about the misalignment.

Once you submit your manager assessment for a staff member, your staff member will receive notification; likewise, once your staff member completes their self-assessment, you will receive email notification. Once both you and your staff member have completed your portions, you will be able to view your staff member's self-assessment next to your manager assessment under the *Performance* tab. You will not be able to view the staff member's self-assessment until after you complete your manager assessment.

The screenshot displays a user profile for Charlotte Danielle Abbott, Sr. HR Administrator. The 'Performance' section is active, showing a 'Review Period' dropdown menu set to 'Oct 2, 2019 - Nov 30, 20...'. Below this, there are two assessment sections: 'Self Assessment' and 'Manager Assessment'. The 'Self Assessment' section shows a completed date of Nov 4, 2019, at 9:53 AM. It includes three questions with responses: 'How well does Helpcontent recognize my value?' (I feel I am highly valued.), 'What would have the greatest impact on my ability to do my best work more often?' (Nothing, I have all I need.), and 'What are some things I do well?' (I am great at seeing the big picture, and delegating work to my team.). The 'Manager Assessment' section shows a completed date of Nov 4, 2019, at 9:37 AM by Jenn Caldwell. It includes two questions with responses: 'What are some things Charlotte does well?' (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 'How could Charlotte improve?' (Sometimes Charlotte is late for work. This adds unneeded stress to her day as she is very busy.).

When submitting your manager assessment, you can set a date for which your staff members can view your manager assessment. For example, if it is important to you that all of your staff members view their assessments on the same date regardless of when you complete them, you can schedule all of them for the same date. **You will not be able to edit an assessment after you submit it.**

When having a performance review conversation with a staff member, it may be helpful to show your staff member the above screen if they do not have a laptop available. If you do so, make sure to click the box "Employee view" so that the view does not show your response to the first two employee questions on the manager assessment.