WHITMAN COLLEGE

COMPLETING THE MANAGER ASSESSMENT
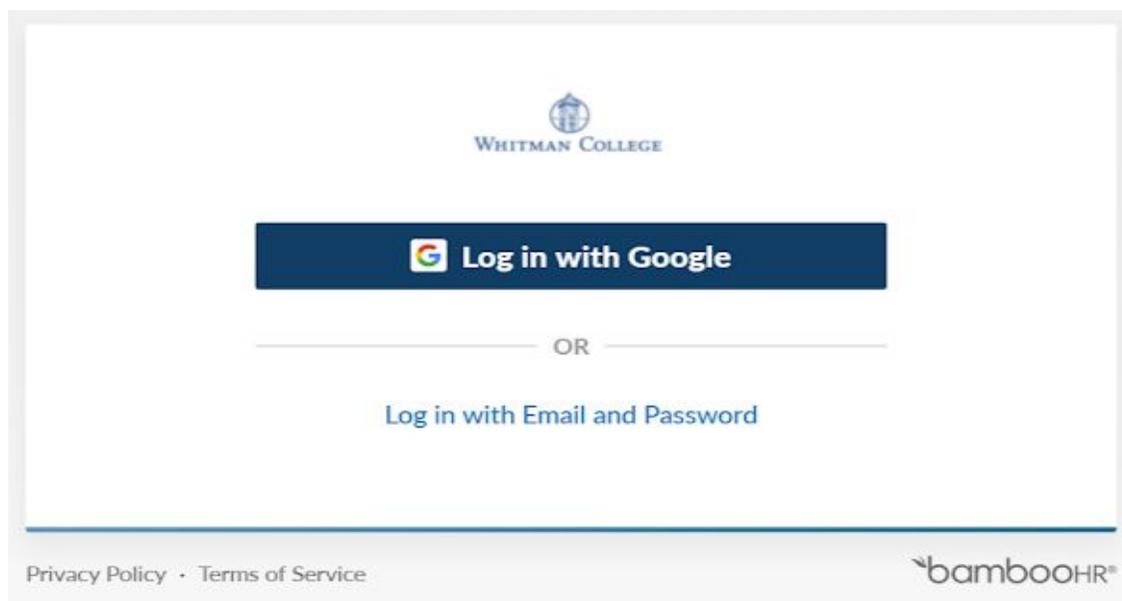**Performance Reviews**

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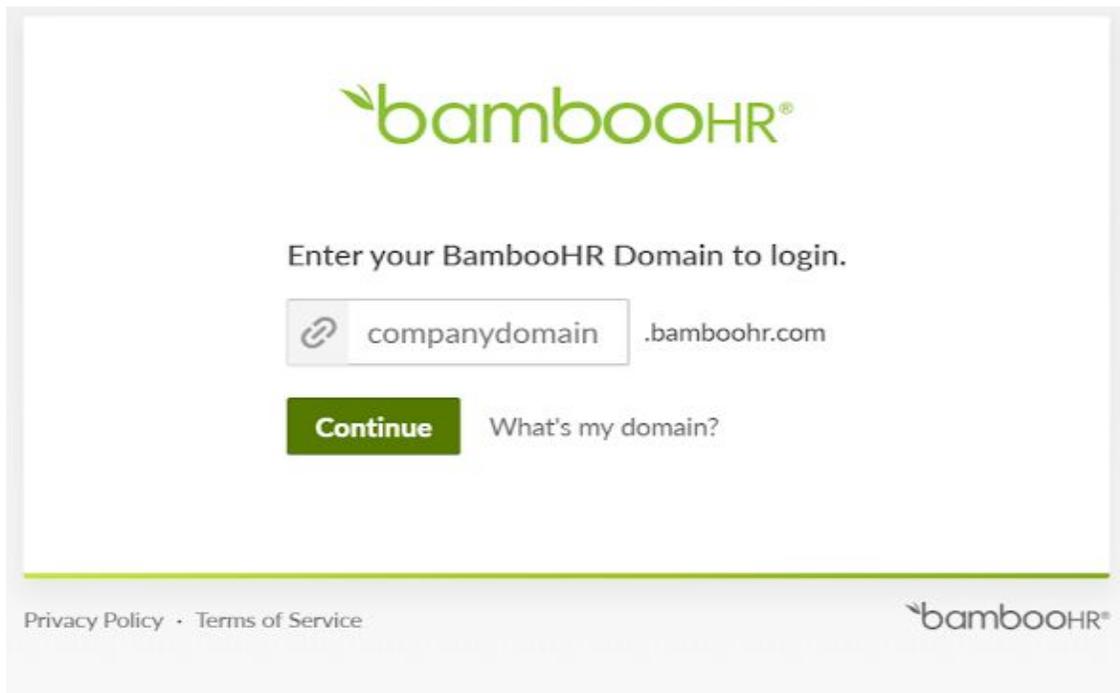
Logging in to BambooHR.
Manager assessments are completed in BambooHR. BambooHR can easily be located at my.Whitman.edu under *Staff Toolbox*.

Click on *Log in with Google*.

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

Completing the Manager Assessment
When you enter BambooHR, scroll down to *Direct Report*s 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?*

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.

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.