



# WHITMAN COLLEGE

## COMPLETING THE MANAGER ASSESSMENT

### Performance Management

#### The performance management process

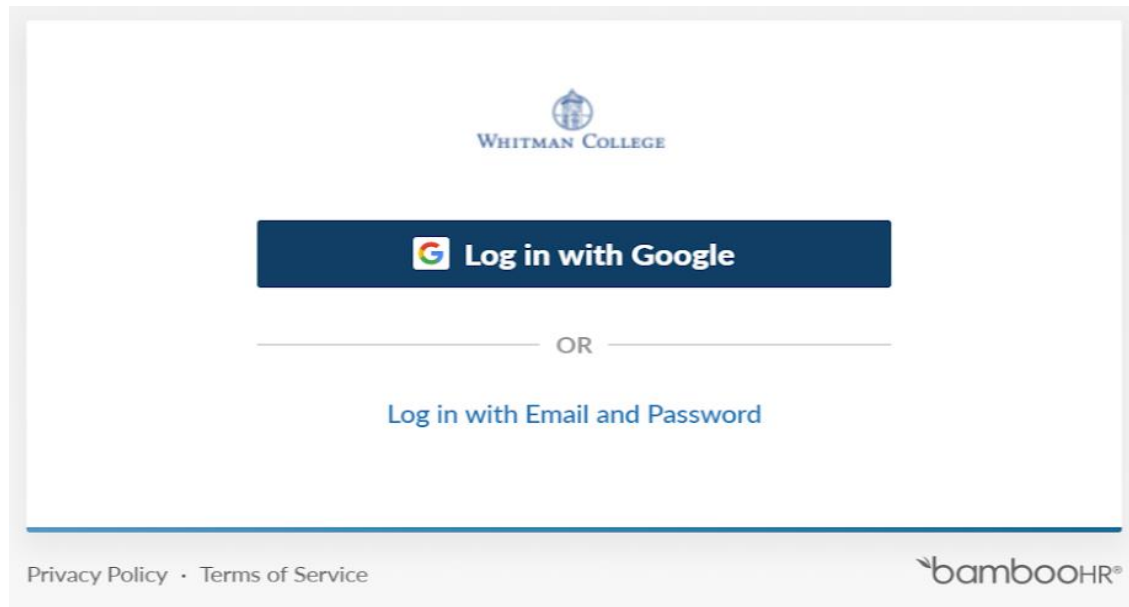
The performance management process consists of three components - goal setting, bi-directional assessments and peer feedback.

1. Goal setting is intended to be fluid, and staff can create goals in BambooHR at any time, but following a performance assessment is a good time to do so. Staff can enter their goals after you discuss them during the performance review conversation. 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 engagement, and the manager assessment.
3. Supervisors will ask peers of each employee to provide feedback anonymously. Once you receive a request to invite feedback, you have two weeks to do so. Once you make the request, a peer has two weeks to provide the feedback. Feedback provided by a peer is not seen by an employee, only by the supervisor.

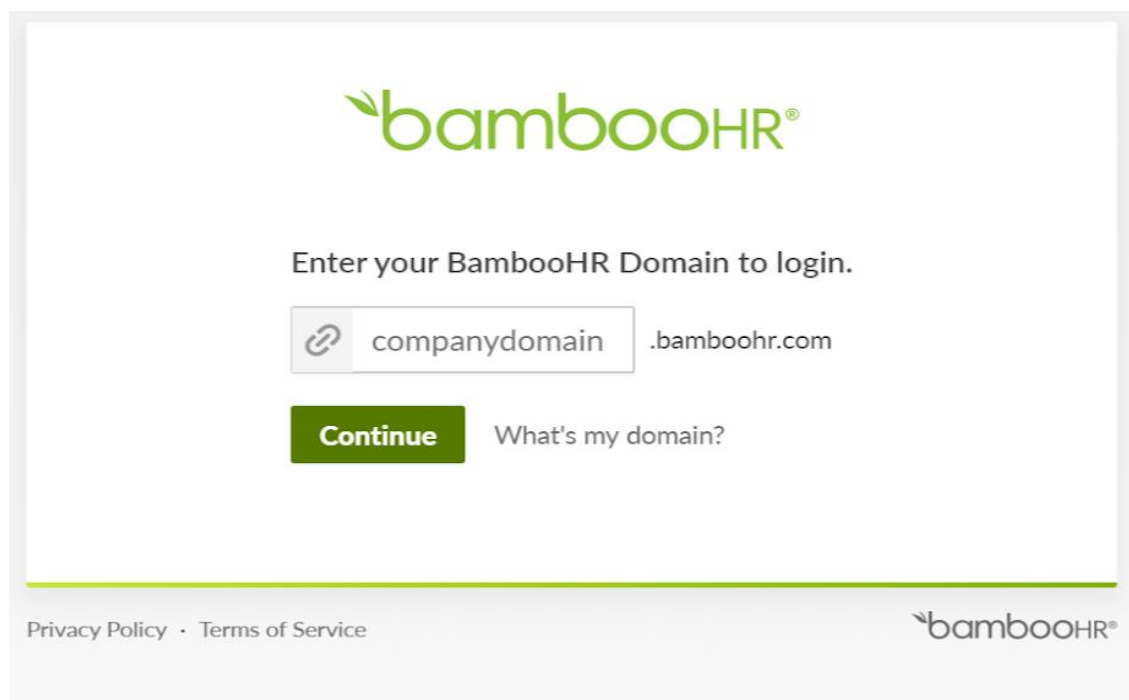
#### Logging in to BambooHR.

Manager assessments are completed in BambooHR. BambooHR can easily be located at [my.Whitman.edu](http://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 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*.

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 the BambooHR interface for a manager assessment. At the top, the user is identified as Charlotte Danielle Abbott, Sr. HR Administrator. The navigation menu includes Personal, Job, Timesheet, Emergency, Performance (highlighted), Notes, Onboarding, and More. The Performance section is active, showing a 'Self Assessment' completed on Jan 29, 2019, and a 'Manager Assessment' in progress. The Manager Assessment section is titled 'Charlotte WILL NOT SEE Your Answers to These 2 Questions' and contains the following questions and answers:

- Question: "If Charlotte got a job offer elsewhere, I would..."  
Answer: "Do everything I could to keep Charlotte. ..."
- Question: "How engaged is Charlotte at work?"  
Answer: "Good engagement and a mostly positive ..."
- Section: "Charlotte WILL SEE Your Answers to The Following Questions"  
Question: "What are some things Charlotte does well? "  
Answer: "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."  
Question: "How could Charlotte improve? "  
Answer: "Sometimes Charlotte is late for work. This adds unneeded stress to her day as she is very busy."

At the bottom of the assessment, there are buttons for "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

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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 performance review interface for Charlotte Danielle Abbott, Sr. HR Administrator. The interface is divided into several sections:

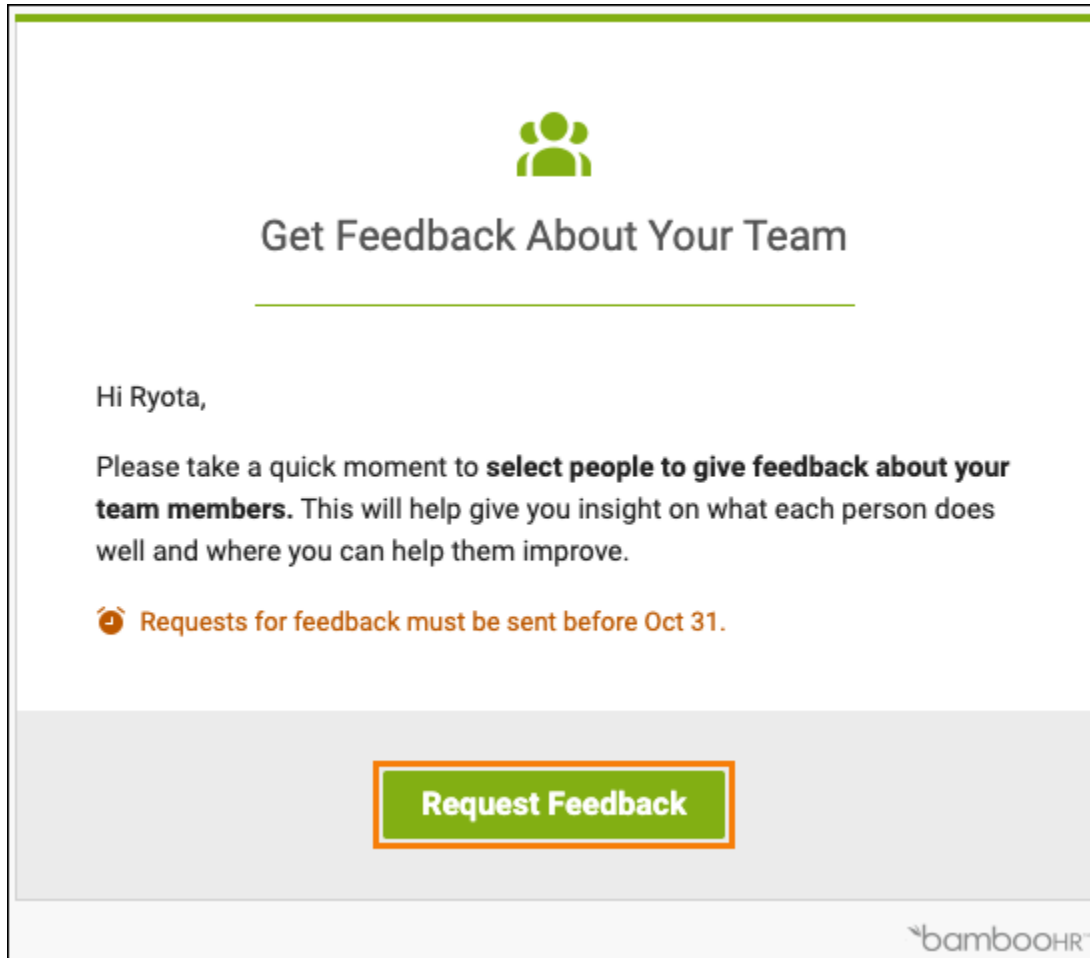
- Header:** Charlotte Danielle Abbott, Sr. HR Administrator. Navigation tabs include Personal, Job, Time Off, Timesheet, Benefits, Pay Info, Performance (selected), Documents, and More.
- Performance Section:** Includes a 'Review Period' dropdown set to 'Oct 2, 2019 - Nov 30, 20...'. Sub-tabs for 'Goals' and 'Assessment' are visible.
- Self Assessment:** Completed on Nov 4, 2019 at 9:53 AM. It contains two questions:
  - How well does Helpcontent recognize my value?** Answer: *I feel I am highly valued.*
  - What would have the greatest impact on my ability to do my best work more often?** Answer: *Nothing, I have all I need.*
- Manager Assessment:** Completed on Nov 4, 2019 at 9:37 AM by Jenn Caldwell. It contains two questions:
  - What are some things Charlotte does well?** Answer: *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.*
  - How could Charlotte improve?** Answer: *Sometimes Charlotte is late for work. This adds unneeded stress to her day as she is very busy.*
- Employee Information:** Includes contact details (415-555-1273, 415-555-8964), hire date (Jul 17, 2014), and manager (Jenn Caldwell).

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. Or, if you want your staff members to be able to view the assessment on the day of their review conversation, you can set it on that 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.

## Inviting peer feedback

After the performance assessment process has concluded, Human Resources will set a date for BambooHR to prompt you to select 1- 10 College employees to provide peer feedback to employees you supervise.



The image shows a screenshot of an email from BambooHR. At the top center is a green icon of three stylized people. Below it is the title "Get Feedback About Your Team" in a dark grey font, underlined with a thin green line. The main body of the email starts with "Hi Ryota," followed by a paragraph: "Please take a quick moment to **select people to give feedback about your team members.** This will help give you insight on what each person does well and where you can help them improve." Below this is a warning icon (a clock with a red exclamation mark) and the text "Requests for feedback must be sent before Oct 31." At the bottom center is a large green button with a white border and the text "Request Feedback" in white. In the bottom right corner, the BambooHR logo is visible.

If an employee supervises other employees, make sure to select those employees so that they have the opportunity to provide feedback to you about their supervisor. You will have two weeks to do the invitations, and then once you issue the invitations, an employee will have two weeks to respond. Employees will be able to give the feedback anonymously so that the person they are giving the feedback about will not be able to review their feedback. It will up to you as the supervisor to determine the best method for sharing this feedback to the employee in ongoing one-on-one meetings.

Note that if you invite someone to give feedback who has already received a request from others five times, you will receive a warning message suggesting you ask someone else.

# Get Feedback about Your Team











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.

 **Past due!** Hurry though, you can still choose people to give feedback on your team.

Employee	Get Feedback from...	
 <b>Jenn Caldwell</b> VP of People Lindon, Utah	← <input type="text" value="Dorothy Chou x"/>	<div data-bbox="1162 693 1362 894" style="border: 2px solid orange; padding: 5px;"><b>Last Time</b> Daniel Vance </div>
 <b>Ryota Saito</b> Chief Operating Officer Lindon, Utah	← <input type="text" value="Dorothy Chou x"/>	
 <b>Eric Pasture</b> VP of IT Lindon, Utah	← <input type="text" value="Dorothy Chou x"/>	
 <b>Cheryl Barnet</b> VP of Customer Success Lindon, Utah	← <input type="text" value="Dorothy Chou x"/>	
 <b>Maja Pandev</b> VP of Product England	← <input type="text" value="Dorothy Chou x"/>	<div data-bbox="826 1610 1279 1738" style="border: 2px solid orange; padding: 5px;"> <b>Whoa...</b> Dorothy Chou will have at least 5 feedback requests. You might want to consider asking others.</div>