2024-2025

Performance Management/Evaluation Training for Managers & Support Staff

The Office of Human Resources

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AGENDA

- Welcome and Introductions

- Performance Management Timeline

- The "Sit Down" Done Right

- Self-Evaluation

- Contributing Reviewers

- Corrective Action Plans

- Performance Management in Oracle

- Q & A

Training Objectives

- Overview of Performance Management in CCPS

- Understand Your Role and Responsibilities

- Tips for Effective Performance Management

- Making the Transition to Oracle Performance Management (SY24/25)

PERFORMANCE TIMELINE

February-March

Training and Self-Evaluation completion (new in SY2024-2025)

March

Managers/Supervisors draft evaluations

Early April

Scheduling of sit-downs/performance feedback meetings with direct reports

April

Sit-downs/performance feedback meetings conducted

May 1 or June 30 (Monday if on a Weekend)

Evaluations digitally signed by employee and evaluator and submitted in Oracle.

July-January

Evaluation cycle begins (journaling, goal setting, etc.)

PERFORMANCE MANAGEMENT OVERVIEW

Key Components of Performance Management

- On-Going/Timely Feedback

- Annual Performance Reviews

- Corrective Action Plans

On-Going Feedback: Tips

Here is a model for providing timely and constructive feedback:

- ✓ Always focus on the behaviors, not the person!
- ✓ Describe the action that was taken or not taken
- ✓ Describe the impact of the action and/or behaviors
- ✓ <u>Engage the employee in discussion</u> of alternative actions or behaviors that will achieve the desired outcomes
- ✓ Confirm/document the understanding (e.g. f/u email)

On-going Feedback: Tips cont'd

- ✓ "Safety" must be established and maintained to have honest and effective performance management conversations
- ✓ Understand what you really want from performance related discussions
- ✓ Use facts and observations when involved in performance related discussions
- ✓ Seek to understand employee's perspective
- ✓ Look for signs that a conversation is deteriorating and use techniques to return it to a "safe place"
- ✓ Seek mutual purpose with the employee

ANNUAL PERFORMANCE EVALUATION

Data to Consider

- Here are some tools that you can use as you prepare annual evaluation documentation:
  - *Job Description and Annual Goals*
  - *Manager's Direct Experience, Observations and knowledge of employee's performance*
  - *Manager's "Drop File"*
    - *Meeting notes/summaries, compliments and concerns from customers, previous evaluations, other performance documents*
  - *Employee Self-Evaluation Form (optional)*
  - *Performance/Contribution against agreed upon expectations*
  - *Email folders that house important communications on deadlines, work product, etc.*
  - *Project tracking tools that enable a "look back" on staff performance*

Purpose of Annual Reviews

- Summarizes employees' accomplishments, contributions, areas for development
- Assign overall performance rating for the year
- Career Development – Set goals, expectations for coming year
  - o Helps to influence promotion opportunities and decisions

- **Have at least 2 SMART Goals**

  ○ **Examples:**

  ○ **Goal #1 Actively participate with a professional organization for career development in upcoming school year**

  ○ **Goal #2 Improve quality of work product by proofreading to self-identify and correct errors in correspondence.**

- **As you develop your goals consider how you will collect data for the purpose of monitoring improvement and impact throughout the year**

ANNUAL PERFORMANCE EVALUATION

Writing the Evaluation

- Have employee complete self-evaluation (optional)

- Self-evaluation information can assist with writing the annual performance evaluation
  - *Self-evaluation can help gauge how much manager/supervisor and employee are on the "same page"*

- Be specific, for example:
  - *Examples of accomplishments*
  - *Measurable improvements*
  - *Customer accolades or complaints (contributing evaluator comments are optional)*
  - *Documented performance coaching or disciplinary action*

- The use of an AI tool to assist with proper grammar, etc., can be helpful (e.g., Gemini, ChatGPT, Grammarly, Co-Pilot, Elicit)

ANNUAL PERFORMANCE EVALUATION

Pitfalls to Avoid

- Recent Event Effect: Allowing recent performance events to drive the overall evaluation

- Halos and Horns: Too much focus on one aspect of performance (either good or bad)

- Bias: Managers values, beliefs, or prejudices distort rating

- Hero or Villain: Rating everyone above average to avoid conflict or rating everyone low because no one can meet your standards

- Strictness: Reluctancy to give high ratings

- Leniency: Tendency to give high scores because manager does not want to give low scores

- Hollow Criticism: Sandwiching negative comments between positive ones without constructive advice on how to improve

ANNUAL PERFORMANCE EVALUATION

The Meeting or "Sit down"

- Schedule in advance

- Provide evaluation at least one day before meeting

- Hold meeting in a private place

- Ensure there are no interruptions

- Allow ample time for the meeting (suggestion: 1 hour)

- Set a positive and welcoming tone; end on a positive note

ANNUAL PERFORMANCE EVALUATION

The Meeting cont'd

- Outline an agenda for the meeting
- Use active listening; hear what the employee has to say or what their questions are
- During a difficult message, stick to "Just the Facts"
  - *Follow the order of the evaluation document*
  - *Don't get emotional*
  - *Allow the employee to make a case, and if they have ample evidence, consider adjusting the review*
- If the staff member becomes angry or upset, stop the meeting and resume the next day if you cannot refocus the individual

KEYS TO DELIVERING THE MESSAGE

- Don't blame others for the message and don't deliver it unless you have bought into it.
  - ✓ "I only rated you this way because my manager told me to."

- Come prepared with examples of any performance issues identified

- Engage in <u>active listening</u>

- Treat the employee with respect and professionalism

Performance Rating	Definition
Unsatisfactory Performance (1-2%) Or As Needed	• Not meeting the requirements of the job; significant guidance and oversight required • Requirements of the job are not being consistently met • Overall performance at bottom of peer group
Needs Improvement Performance (3-5%) Or As Needed	• Performance meets some of the expectations of the role • Requires additional guidance and oversight in some areas • Overall performance and impact lower than most of peer group
Satisfactory Performance (55-60%)	• Meets performance expectations of the role • Normal and consistent trajectory of performance and contributions • Overall performance is representative of the majority of others in peer group
Highly Effective Performance (20-25%)	• Consistently meets and often exceeds performance expectations • Goes above and beyond either when asked or by own initiative with positive impact on the department • Overall performance and contributions are above the majority of others in peer group
Outstanding Performance (5-10%)	• Consistently exceeds performance expectations for role and sustains it • Goes above and beyond based on own initiative with consistent and significant positive impact on the department • Leadership and contributions consistently exceed others in peer group

"Bell curve"
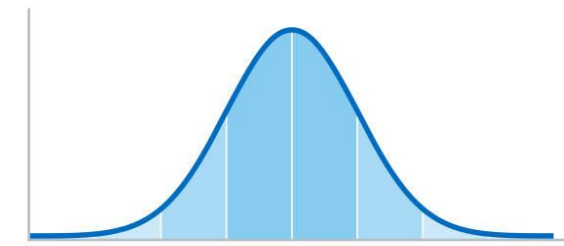
ANNUAL PERFORMANCE EVALUATION

2024-2025

Checklist

✓ Allow employee to provide written response to evaluation if they request

✓ Be willing to change evaluation rating or language if facts warrant (after considering new information)

✓ Provide a copy of the final version to the employee

✓ Provide HR with a copy of the final version (housed and tracked in Oracle)

✓ Keep a copy for your files (if using paper)

PROBATIONARY PERIOD EVALUATIONS

- Newly hired staff are subject to a probationary period (AFSCME 6 months; EACC non-tenured).

- Managers should review job description and set expectations upon start date. If concerns arise, managers should engage with the employee to provide notice of concern and opportunity for improvement. (*Document it!*)

- A performance review should be completed at the end of the probationary period to assess progress. All performance reviews will be kept electronically in the Oracle system.

- Consult with HR if there is a concern that the employee will not pass the probationary period.

Contributing Reviewer

A "contributing reviewer" in performance management refers to an individual, usually a peer or colleague, who provides feedback on an employee's performance, contributing their perspective alongside the employee's direct manager to offer a more comprehensive evaluation of their work performance.

- They provide insight into an employee's performance that might not be visible to their direct manager, including collaboration skills, teamwork, and interactions with other departments.

- Peer contributor - Provide constructive feedback on strengths and areas of improvement

The Performance Management module in Oracle enables direct supervisors to electronically select contributing reviewers. These reviewers can submit their feedback, which is then forwarded to the manager within the Performance Management module. The manager retains the discretion to incorporate the provided feedback as deemed appropriate

CORRECTIVE ACTION PLANS

➢ Action plans do not replace managers' responsibilities for providing <u>timely</u>, <u>honest</u>, and <u>ongoing</u> informal and formal performance feedback.

➢ Action plans are used to provide a clear, measurable written road map of expectations and deliverables when other methods have failed to produce necessary improvement in an employee's performance.

➢ Generally used as the tool of last resort and <u>should not be viewed or delivered</u> as punishment for poor performance.
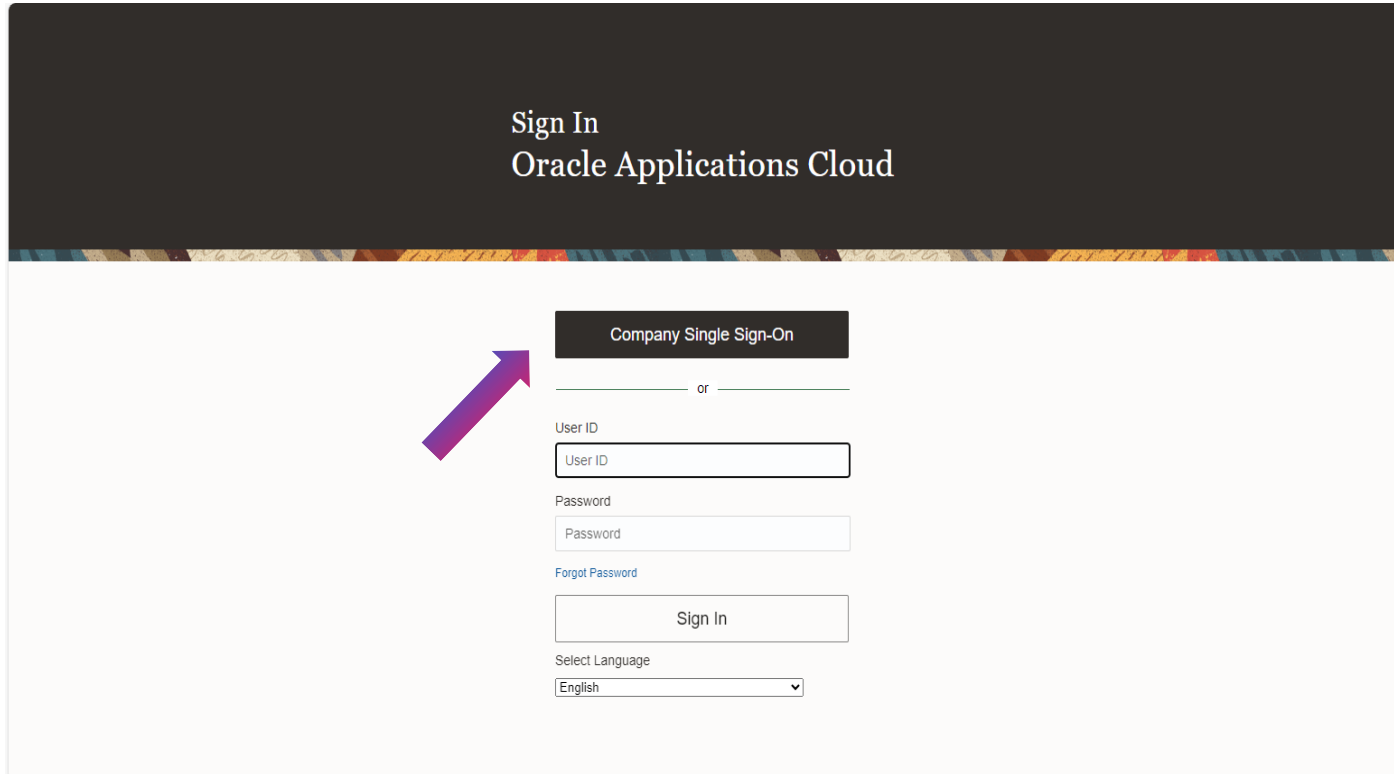
Transitioning to Oracle

Tips for managers...
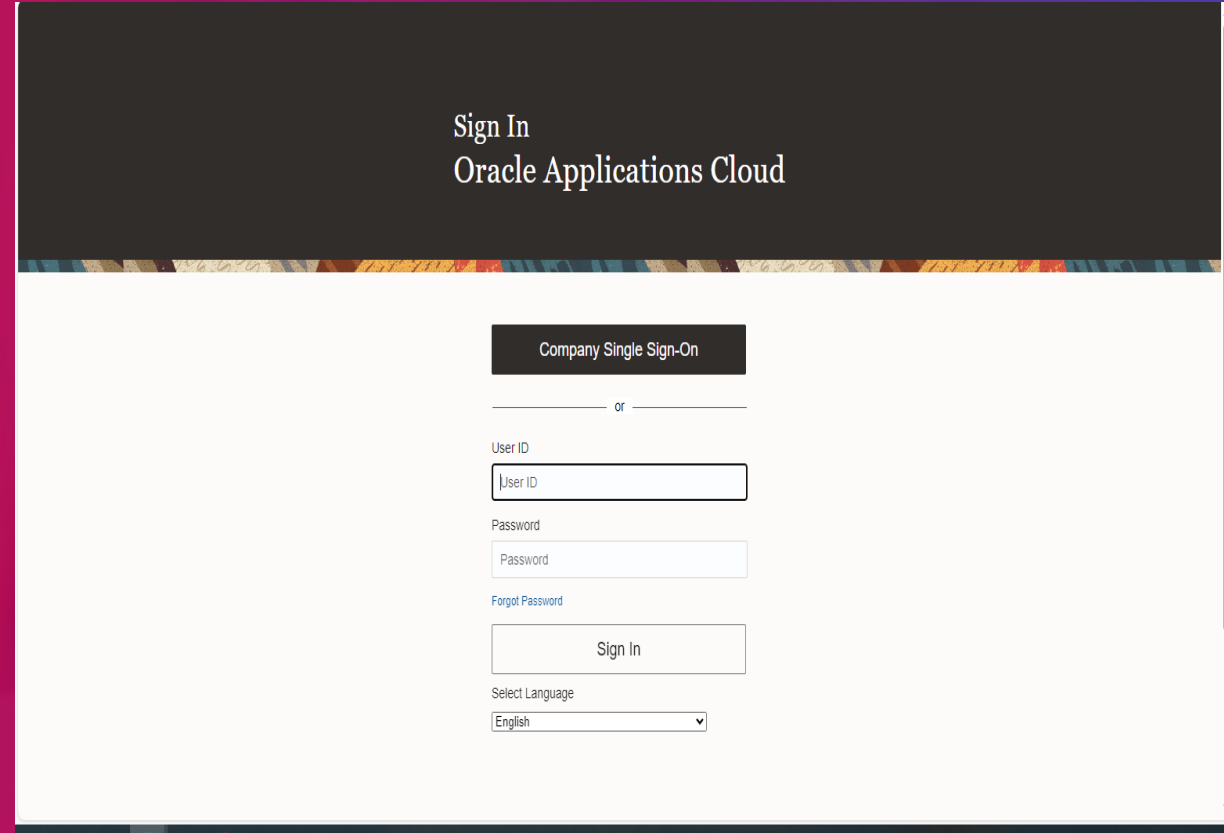
Completing the Performance Eval in Oracle

Sign in to Oracle by clicking the "Company Single Sign-On" option

Locating Your Staff in Oracle
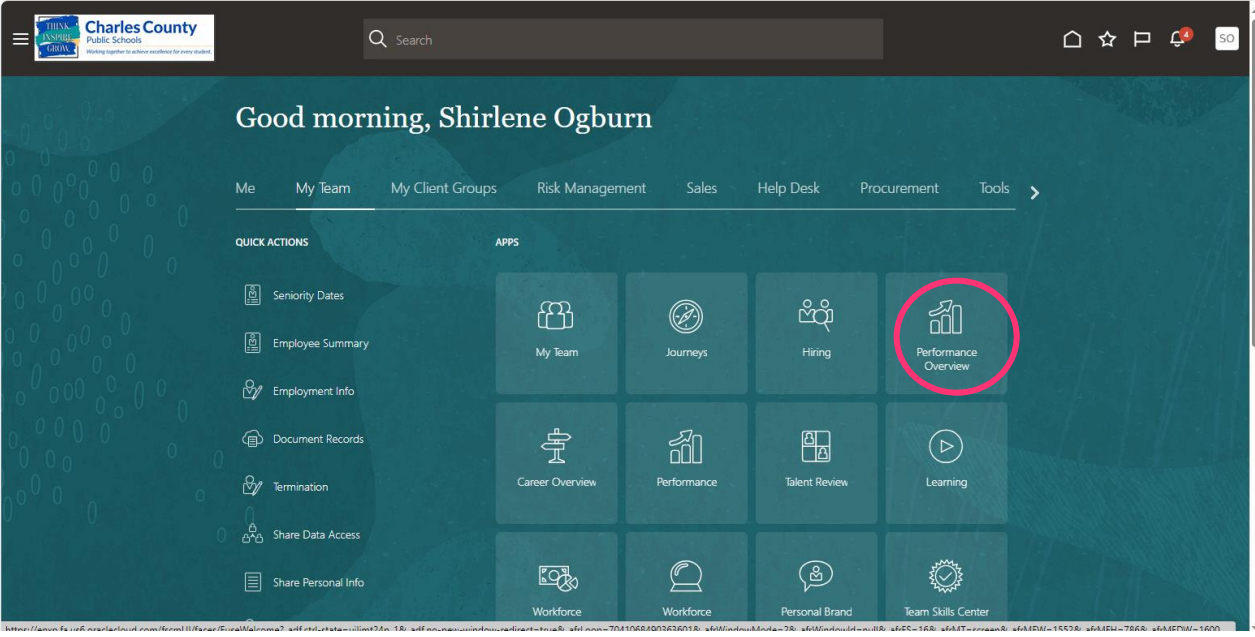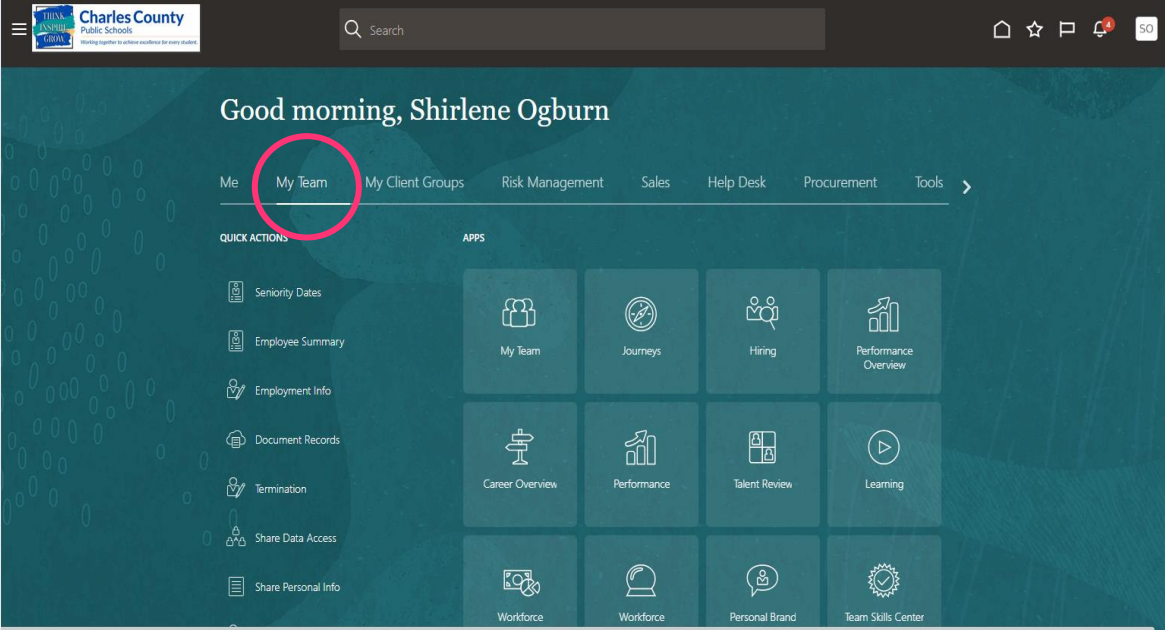
Employee Name Search
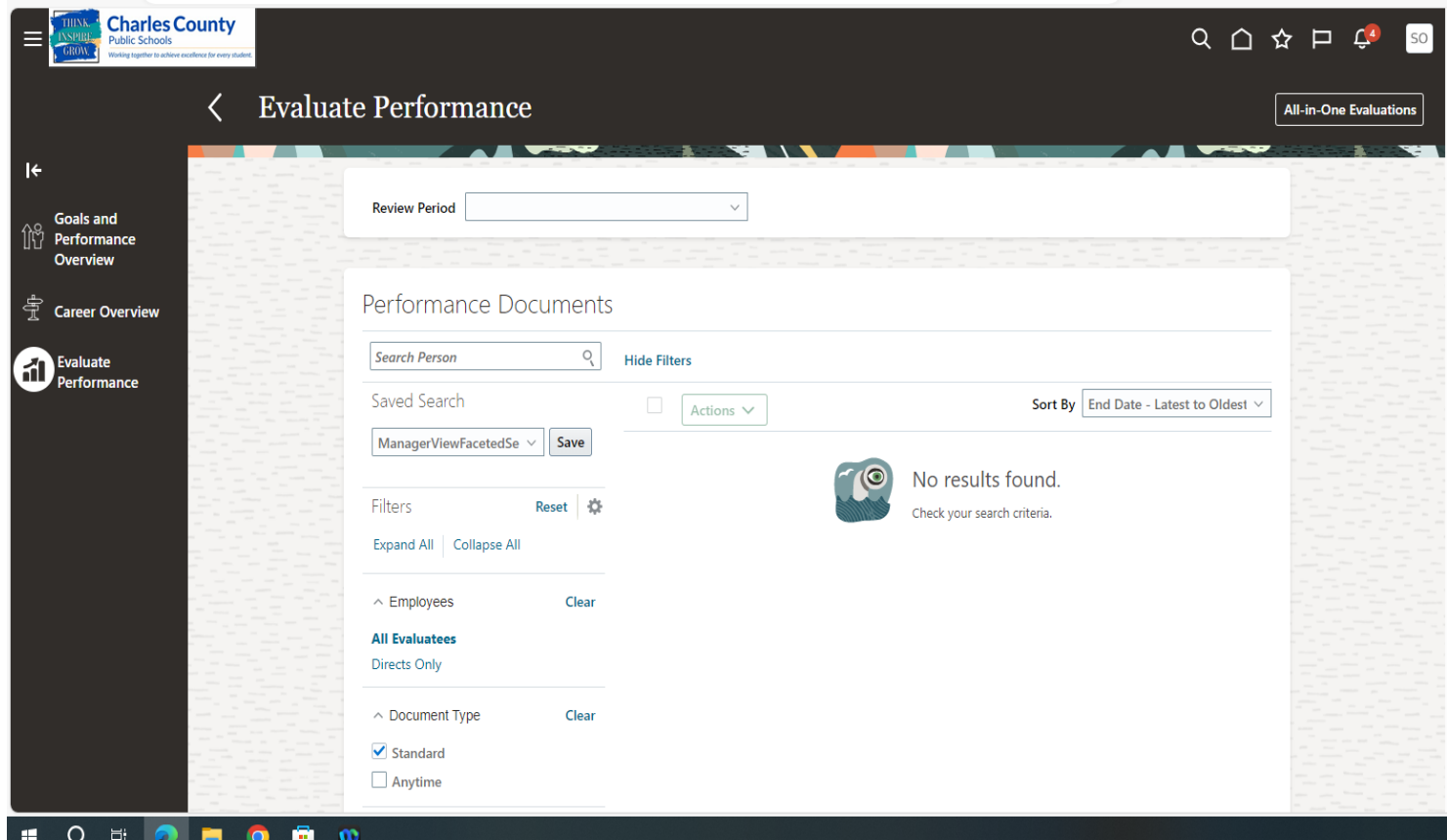
ADD GOALS DISCUSSED WITH THE EMPLOYEE

SELECT EMPLOYEE

SELECT EVALUATE PERFORMANCE

CLICK THE 2025 SUPPORT STAFF SELF-EVAL LINK
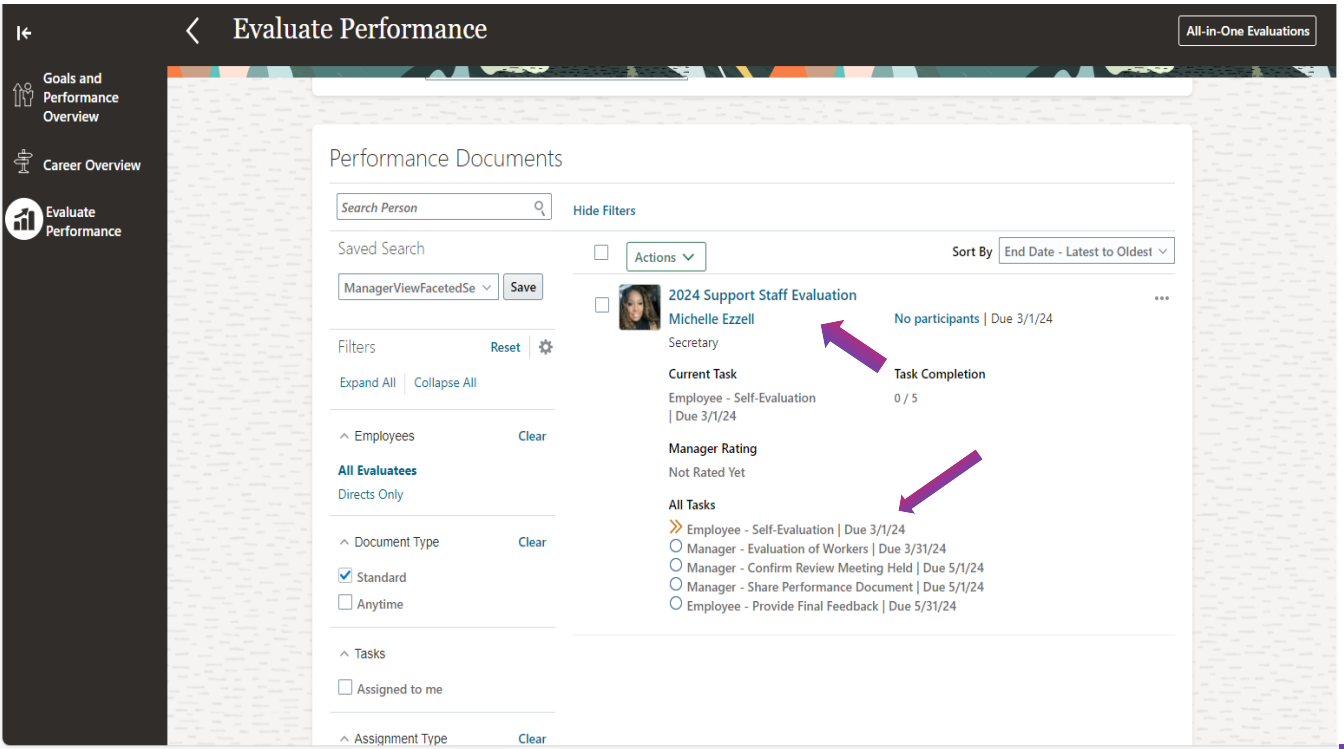
MANAGERS CAN BYPASS SELF-EVALUATION
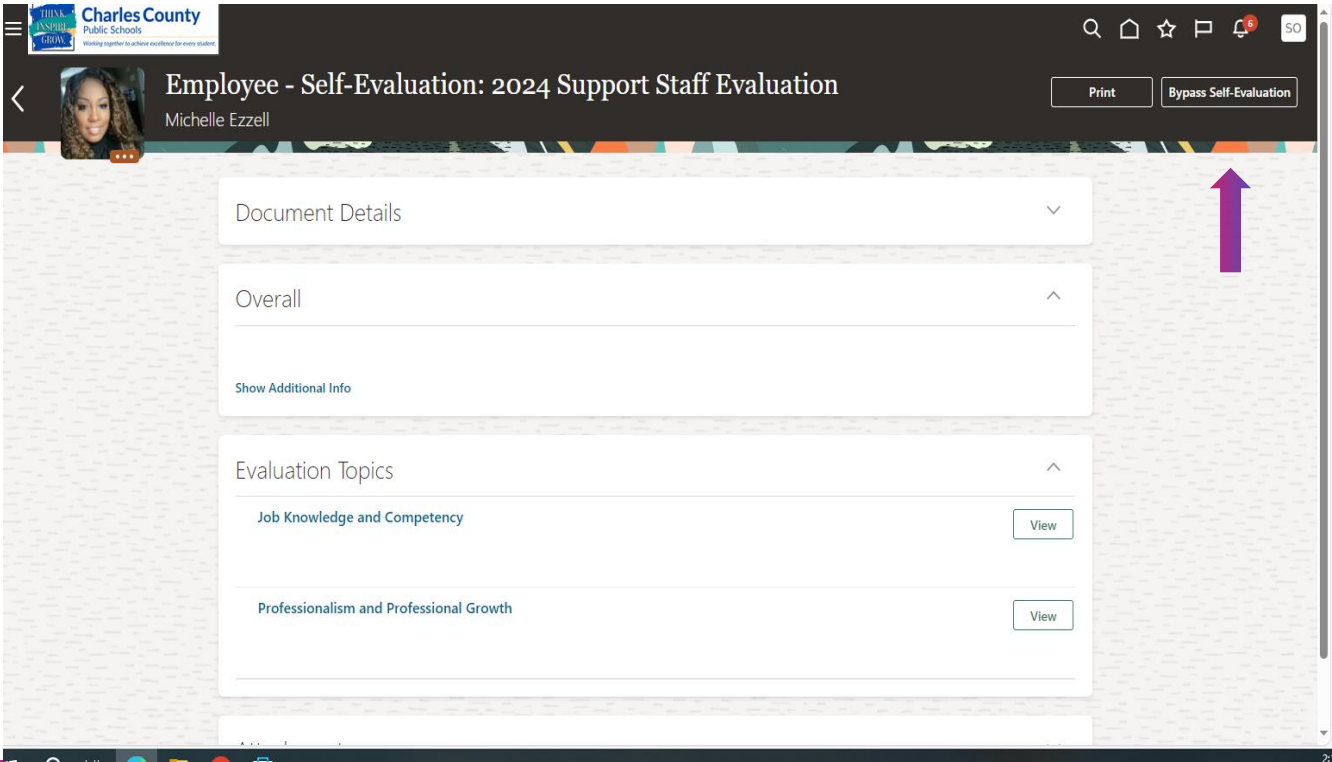
Human Resources is here to help you!

- Being a manager is a challenging role, but it is critical to make time for providing recognition and discussing concerns.

- HR is here as a partner to advise and assist you, so please reach out to us!
  - ✓ Meeting to discuss issues and plans of action
  - ✓ Coaching on how to deliver the appropriate message
  - ✓ Providing exempt/non-exempt guidance for positions

Questions or Comments?

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THANK YOU!

The Office of Human Resources