



EVALUATION

# Performance Evaluation/Evaluation Training for Managers & Support Staff

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**The Office of Human Resources**

*Nikial Majors, Chief Human Resources Officer; Shirlene Ogburn, Supervisor of Employee Services*



# AGENDA


Performance Management Training

- Welcome and Introductions
  - Performance Evaluation Timeline
  - The "Sit Down" Done Right
  - Self-Evaluation
  - Contributing Reviewers
  - Corrective Action Plans
  - Performance Evaluation in Oracle
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# Training Objectives

Performance Management Training

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- Overview of Performance Evaluation in CCPS
  - Understand Your Role and Responsibilities
  - Tips for Effective Performance Evaluation
  - Transitioned to Oracle Performance Evaluation SY24/25

# PERFORMANCE TIMELINE



## February-March

Training and Self-Evaluation  
Completion



## March

Managers/Supervisors draft  
evaluations



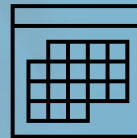
## Early April

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 Evaluation Overview

## Key Components of Performance Evaluation

- **On-Going/Timely Feedback**
- **Annual Performance Reviews**
- **Corrective Action Plans**

# Ongoing Feedback: Tips

## 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
- ✓ Engage the employee in discussion 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 Evaluation conversations
- ✓ Understand what you really want from performance-related discussions
- ✓ Use facts and observations when involved in performance-related discussions
- ✓ Seek to understand the 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

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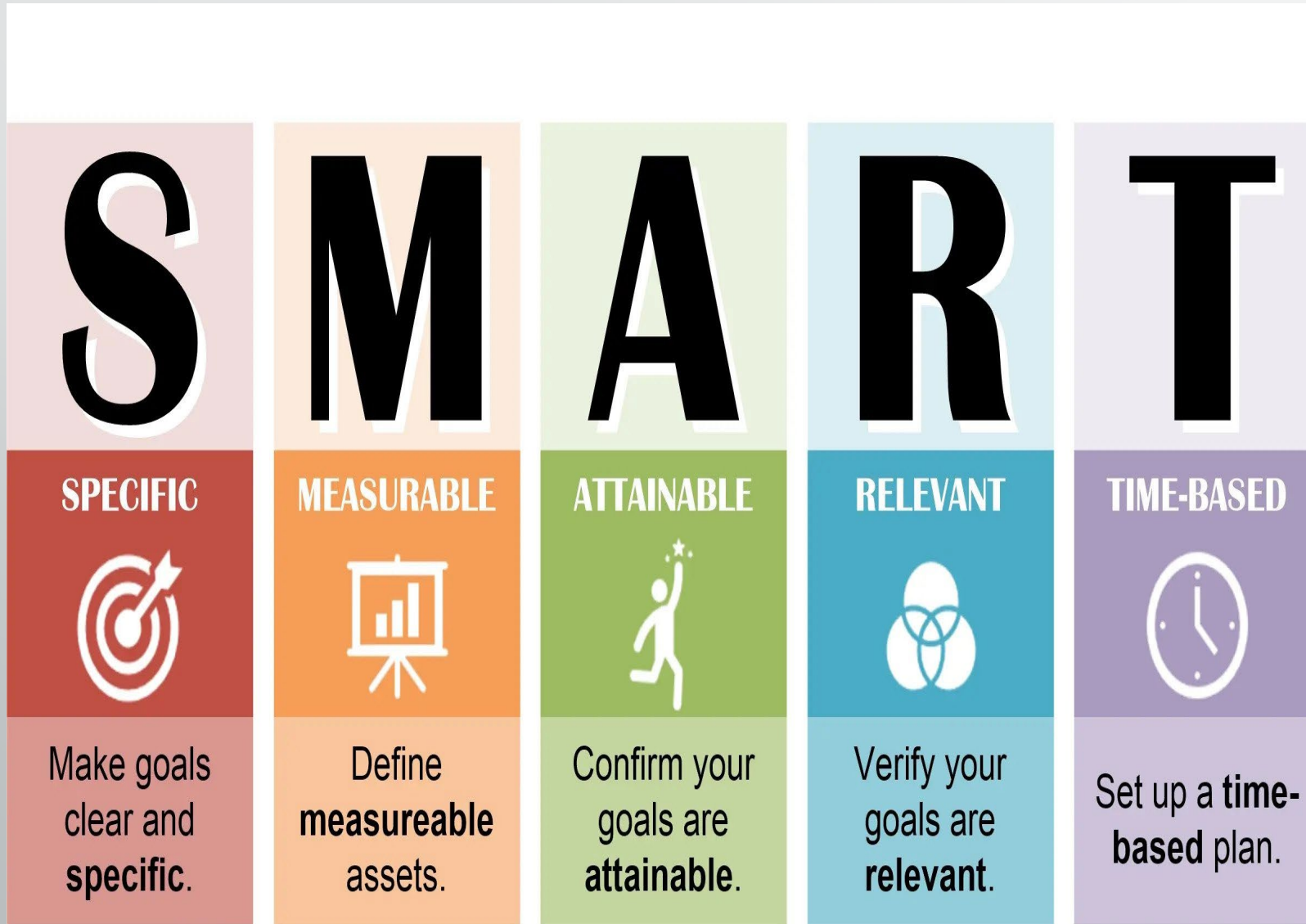
## Data to Consider

- 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
  - Helps to influence promotion opportunities and decisions





## Creating Goals

- 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

- Encourage staff to complete self-evaluation (optional)
- Self-evaluation information can assist with writing the annual performance evaluation
  - Self-evaluation can help gauge how much the 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

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## 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

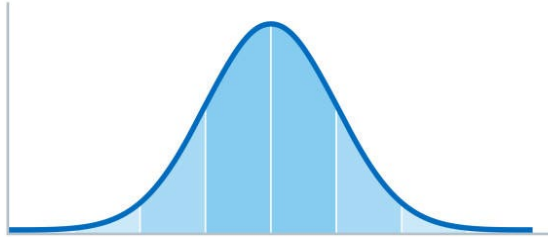
- Outline an agenda for the meeting
- Use active listening; hear what the employee has to say or what their questions are
- During a difficult message, stick to “Just the Facts”
  - *Follow the order of the evaluation document*
  - *Don't get emotional*
  - *Allow the employee to make a case, and if 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."
  - ✓ "Your colleague(s) shared their perceptions of your work."
- Come prepared with examples of any performance issues identified.
  - ✓ "During our meeting on \_\_\_\_\_, we discussed improvement needed on \_\_\_\_\_."
  - ✓ "In your last performance evaluation, you were given direction to \_\_\_\_\_."
- Engage in active listening
- Always treat employees with respect and professionalism, including during the sit-down meeting.

Performance Rating	Definition
<b>Unsatisfactory Performance</b> (1-2%) <b>Or As Needed</b>	<ul style="list-style-type: none"> <li>• Not meeting the requirements of the job; significant guidance and oversight required</li> <li>• Requirements of the job are not being consistently met</li> <li>• Overall performance at bottom of peer group</li> </ul>
<b>Needs Improvement Performance</b> (3-5%) <b>Or As Needed</b>	<ul style="list-style-type: none"> <li>• Performance meets some of the expectations of the role</li> <li>• Requires additional guidance and oversight in some areas</li> <li>• Overall performance and impact lower than most of peer group</li> </ul>
<b>Satisfactory Performance</b> (55-60%)	<ul style="list-style-type: none"> <li>• Meets performance expectations of the role</li> <li>• Normal and consistent trajectory of performance and contributions</li> <li>• Overall performance is representative of the majority of others in peer group</li> </ul>
<b>Highly Effective Performance</b> (20-25%)	<ul style="list-style-type: none"> <li>• Consistently meets and often exceeds performance expectations</li> <li>• Goes above and beyond either when asked or by own initiative with positive impact on the department</li> <li>• Overall performance and contributions are above the majority of others in peer group</li> </ul>
<b>Outstanding Performance</b> (5-10%)	<ul style="list-style-type: none"> <li>• Consistently exceeds performance expectations for role and sustains it</li> <li>• Goes above and beyond based on own initiative with consistent and significant positive impact on the department</li> <li>• Leadership and contributions consistently exceed others in peer group</li> </ul>

# "Bell curve"



# ANNUAL PERFORMANCE EVALUATION

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## 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
- ✓ HR *only* will have access to the final version (housed and tracked in Oracle)
  - ✓ Managers/supervisors can request a PDF version of finalized evaluations from HR.

# PROBATIONARY PERIOD EVALUATIONS

- Newly hired staff are subject to a probationary period (AFSCME 6 months; EACC non-tenured teachers).
- 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 Evaluation 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 Evaluation 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 Evaluation module. The manager retains the discretion to incorporate the provided feedback as deemed appropriate



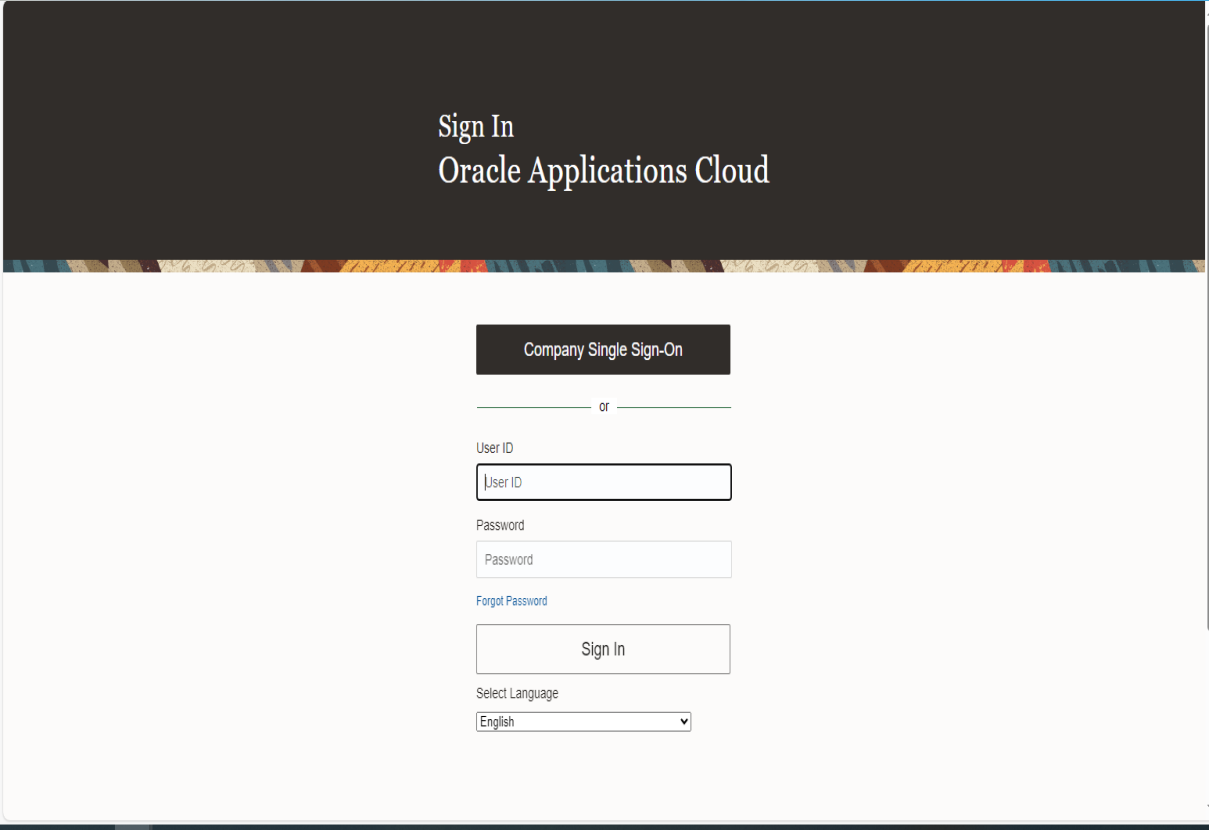
# CORRECTIVE ACTION PLANS

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- Action plans do not replace managers' responsibilities for providing timely, honest, and ongoing 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 should not be viewed or delivered as punishment for poor performance.

# Transitioning to Oracle

**Tips for supervisors/managers and direct reports.**



The screenshot shows the Oracle Applications Cloud sign-in interface. At the top, it says "Sign In Oracle Applications Cloud". Below this is a "Company Single Sign-On" button. Underneath, there is an "or" separator. The form includes fields for "User ID" and "Password", a "Forgot Password" link, a "Sign In" button, and a "Select Language" dropdown menu currently set to "English".

# Completing the Performance Eval in Oracle

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

Sign In  
Oracle Applications Cloud

Company Single Sign-On

or

User ID  
User ID

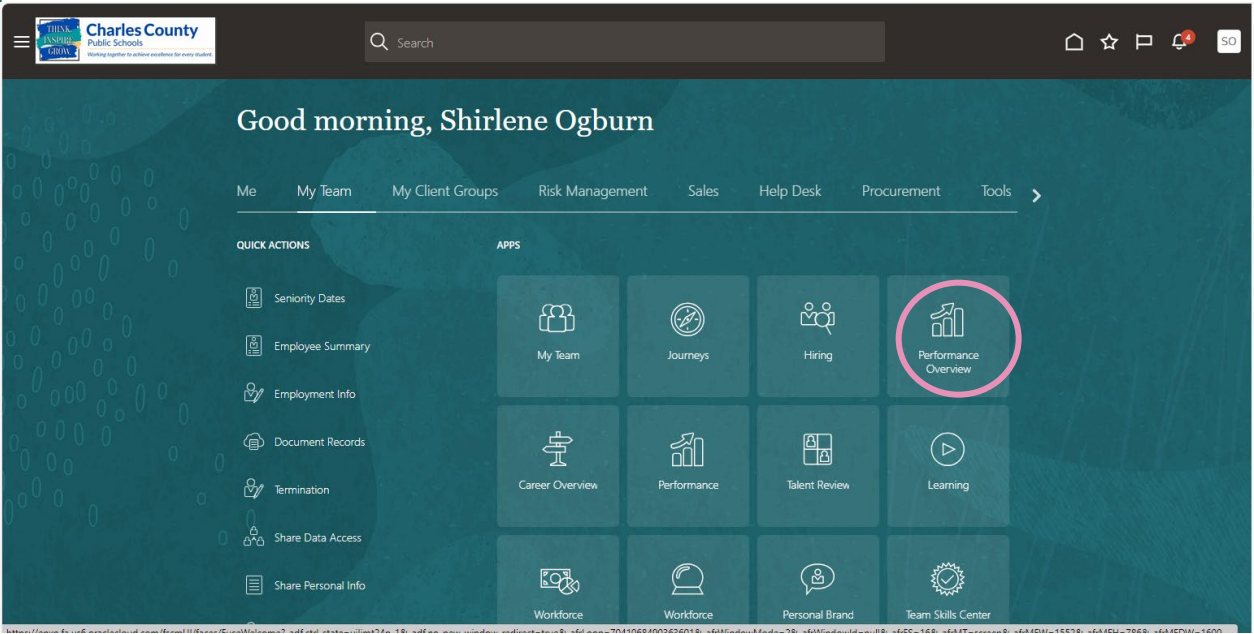
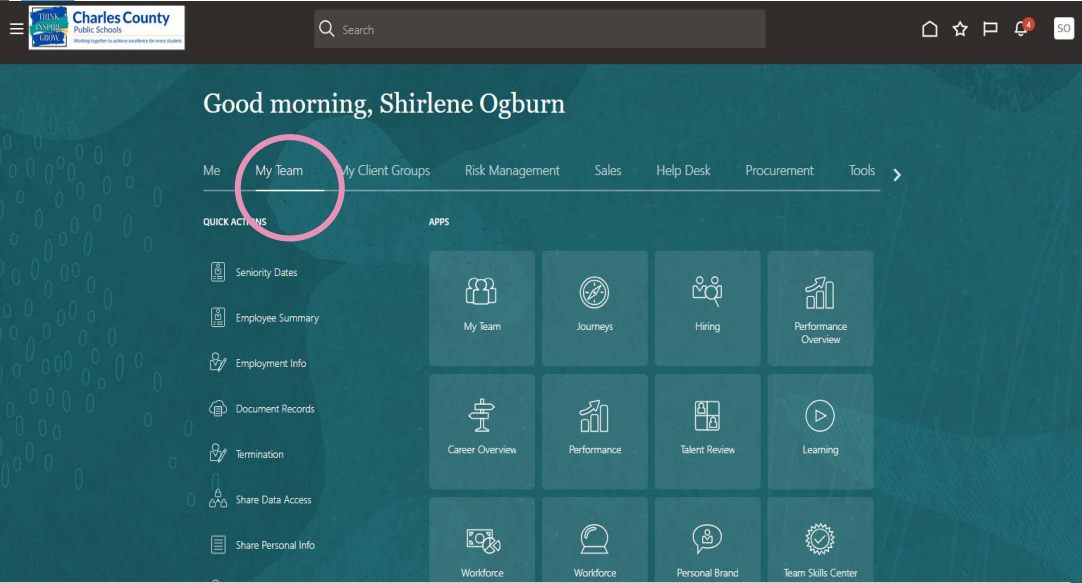
Password  
Password

[Forgot Password](#)

Sign In

Select Language  
English

# Locating Your Staff in Oracle



# Evaluate Performance

All-in-One Evaluation

Review Period

## Performance Documents

Hide Filters

Saved Search

Actions

Sort By

Filters

Employees

**All Evaluatees**

Directs Only

Document Type

Standard

Anytime



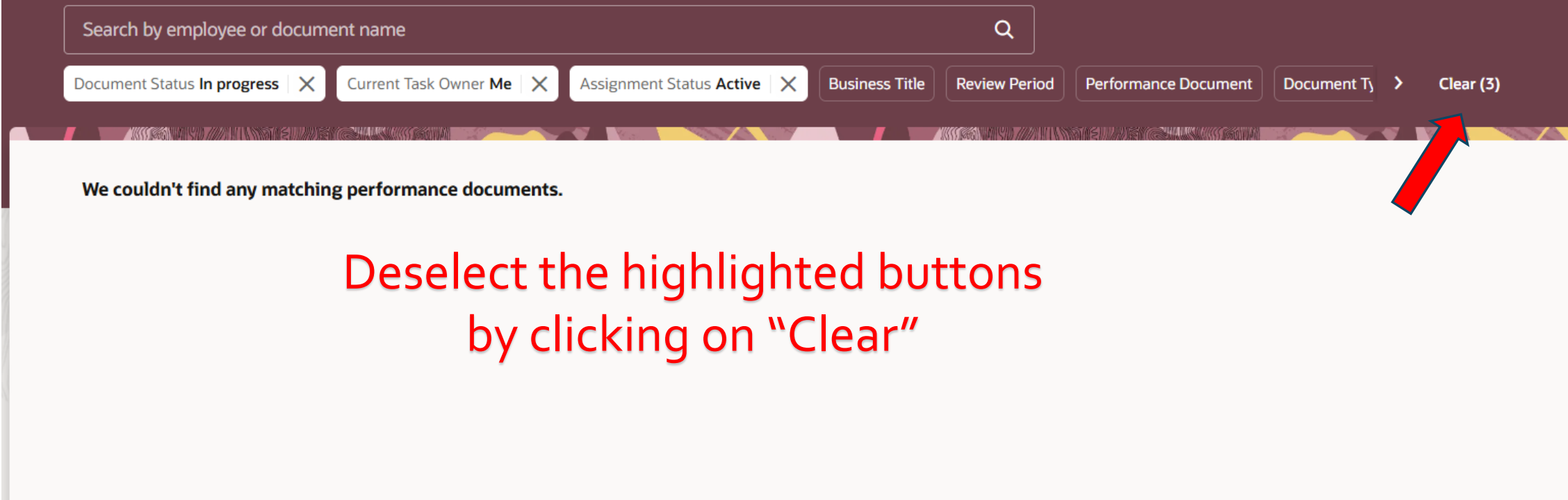
No results found.

Check your search criteria.

Previous PM version

Performance Ma

# WHAT'S NEW IN THE REDWOOD VERSION



Search by employee or document name

Document Status **In progress** | X | Current Task Owner **Me** | X | Assignment Status **Active** | X | Business Title | Review Period | Performance Document | Document Type > | **Clear (3)**

We couldn't find any matching performance documents.

**Deselect the highlighted buttons  
by clicking on "Clear"**

# Employee Name Search

The screenshot displays the 'Evaluate Performance' interface. At the top, there is a search bar with the placeholder text 'Search by employee or document name'. A red arrow points to this search bar. Below the search bar, there are several filter buttons: 'Document Status', 'Current Task Owner', 'Assignment Status', 'Business Title', 'Review Period', and 'Performance Document Support Staff Evaluation 2026'. The 'Performance Document Support Staff Evaluation 2026' button is highlighted with a red circle. To the right of these filters, there are buttons for 'Current Task' and 'Clear (1)'. Below the filters, there is a table of results. The first row shows a document titled 'Support Staff Evaluation 2026' by 'Michelle Ezzell', which is circled in red. To the right of this row, there is a '2026' label and an 'In progress' status, with a red circle around the three dots menu icon. Below the table, there are three progress indicators: 'Document Progress' (0 of 5 tasks), 'Current Task' (Employee - Self-Evaluation), and 'Participant Feedback' (No participants yet).

# REVIEW THE EMPLOYEE'S SELF-EVALUATION

[←](#) **Employee - Self-Evaluation** Bypass Employee Self-Evaluation

Michelle Ezzell

Performance Document Support Staff Evaluation 2026 Evaluated By Shirlene Ogburn

**Review employee feedback**  
Go to Manage Participant Feedback

**Review employee competencies**  
Go to Skills and Qualifications

# Request a Contributing Reviewer

**Participants**

**+ Add** Send Request

After participants are added, you can see them here.

**Participant Summary**

Role	Role Description	Request Not Sent	Awaiting Reply	Feedback Completed
Contributing Reviewer	Contributing Reviewer	0	0	0

# REVIEW THE EMPLOYEE'S SKILLS & QUALIFICATIONS

**Employee - Self-Evaluation**  
Michelle Ezzell

Performance Document Support Staff Evaluation 2026 Evaluated By Shirlene Ogburn

[Bypass Employee Self-Evaluation](#)

**Review employee feedback**  
Go to Manage Participant Feedback

**Review employee competencies**  
Go to Skills and Qualifications

The screenshot shows a user interface for an employee's profile. At the top, there is a header with a back arrow, a profile picture of Michelle Ezzell, the name 'Michelle Ezzell', and an 'Actions' dropdown menu. Below the header, there are two main sections: 'Education' and 'License and Certification'. The 'Education' section contains one entry for a Bachelor's Degree in Criminal Justice, with a source of 'Talent Profile' and a last updated date of '11/13/25'. The 'License and Certification' section is currently empty, displaying a message 'There's nothing here so far.' with a small icon of a nest.


Education	
Bachelor's Degree	
<b>Major</b> Criminal Justice	<b>Source</b> Talent Profile
<b>Year Acquired</b> 2025	<b>Last Updated Date</b> 11/13/25

License and Certification

There's nothing here so far.

# Employee Skills & Qualifications

# BY-PASS THE SELF-EVALUATION

<  **Employee - Self-Evaluation**  
Michelle Ezzell

Performance Document Support Staff Evaluation 2026 Evaluated By Shirlene Ogburn

[Bypass Employee Self-Evaluation](#)

**Review employee feedback**  
Go to Manage Participant Feedback

**Review employee competencies**  
Go to Skills and Qualifications

# 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

Performance Management Training





**Questions or Comments?**

**Please contact us at**

**[humanresources@ccboe.com](mailto:humanresources@ccboe.com)**



**THANK YOU!**

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**The Office of Human Resources**