

Relational Supervision

The AP Performance Review Process

High-Quality Performance Reviews

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The Review Process

The value to supervisors of performance reviews:

- ✓ **Discover what is important to employees**
- ✓ **Insights into their work and challenges ...from their perspective**
- ✓ **New ideas**
- ✓ **Areas of interest (achievement)**
- ✓ **Areas for improvement**
- ✓ **Allow employees time to focus on successes**

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The Review Process

Steps of a performance review:

1. Employee initiates the review process in Laserfiche
 - Employee self-reviews and rates performance in each of the sections
2. Supervisor completes initial review and rates employee's performance in each of the sections
3. Meet and discuss reviews and discuss ratings
 - Supervisor makes final comments and rating in each of the sections
4. Supervisor and employee make final review comments, and sign.
5. Forward to VP for signature

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The Review Process Performance Review Form

Eastern Oregon University
Performance Review Form (to be completed for all Administrative Professional staff and forwarded to Human Resources Dept.)

Employee Name: _____ EOU ID Number: _____
Department: _____ Position Title: _____
Review Completed By: _____ Review Period: from _____ to _____
Is PD is up to date? Yes No If not up to date, last approved date? _____ 20_____

Key Elements (Competencies): (Supervisor comments supporting rating required in every section.)

1. **Accomplishments** - the extent to which the employee meets expectations in performing the job functions of his/her position as defined in documentation such as the current PD, annual work plan, etc.

5 Consistently Exceeds Expectations
4 Fully Achieves and Occasionally Exceeds Expectations
3 Fully Achieves Expectations
2 Sometimes Achieves Expectations
1 Unsatisfactory/Rarely Achieves Expectations

Supervisor comments about rating: _____

2. **Service and Relationships** - the extent to which the employee's behaviors are directed toward fostering positive working relationships in a diverse workplace, respect for one's fellow workers, and cooperation with students, customers, and visitors.

List of committee appointments, if any: _____

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Steps of a performance review:

1. Prepare

- ✓ Give advance notice of when the review is scheduled
- ✓ Let employees know what to expect
- ✓ Ask employee to conduct a self-review and to be ready to discuss (a) the reasons supporting the ratings of his/her work performance and (b) the development goals for upcoming year.
- ✓ Ask if he/she has questions about how to conduct a self-review

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The Review Process

Pre-review by Supervisor:

1. Rate one section at a time
2. Judge performance ...not personality.
3. Score ratings on actual achievement of goals and objectives
4. Be fair and consistent
5. Do not use the performance review as a method for making employees happy.
6. Avoid using factors not permitted in employment matters (race, creed, color, sex, gender, religion, etc.)

Tip: High quality written goals & objectives => high quality reviews

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The Review Process

Barriers to high-quality reviews:

- ✓ Personality differences
- ✓ Using high review scores as a motivator to feel happy or to give a sense of job security.
- ✓ Perception of “Perfect Employee”
- ✓ First Impression vs. thoughtful reflection on actual performance
- ✓ Recalling Only Recent Events
- ✓ Avoiding underperforming areas
- ✓ Judging Factors Unrelated to Objectives
- ✓ Misunderstanding How to Rate

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The Review Process

Tips for successful review discussions:

- ✓ Encourage and allow participation – the review is a dialogue
- ✓ Be candid and specific about the employee's behavior and work
- ✓ Use all of your active listening skills
- ✓ 100% sincerity
- ✓ “Clarity is caring”... be clear in your conversation with the employee, and have genuine interest in the person (this will help relieve you of your own anxieties!)

Continued...

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The Review Process

Tips for successful review discussions (continued):

- ✓ Focus on what was, not what could have been
- ✓ Consider circumstances and your own actions that affected the employee's performance
- ✓ Don't make promises you can't keep or "cut deals"
- ✓ Strive for agreement
- ✓ End each section review on a positive note
- ✓ Score final rating objectively
- ✓ Performance Reviews are never disciplinary meetings

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The Review Process

Questions Frequently Asked by Employees

- ✓ What about the scores of other employees?
- ✓ Did both supervisors from last year review me?
- ✓ Remember when I did...
- ✓ I don't agree with your rating...
- ✓ How do I get a "Consistently Exceeds Expectations"?

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Next Step: Setting Goals and Objectives

Work Goals and Objectives

1. Well written goals and objectives = higher quality reviews: clear, specific, realistic.
2. Avoid over-focus on current projects.
3. Should reflect the fundamental priorities, roles, and responsibilities of position:
 - a. Volume and quality of work
 - b. Technical knowledge and skills
 - c. "Customer" skills
 - d. Teamwork and collaboration skills
4. It is vital to gain agreement on the Measures of Goal Evaluation (achievement/success).

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Practice Exercises

With another person:

Practice writing one high-quality goal for each of your jobs.

Check it for quality:

- Clear
- Specific
- Realistic
- Time frame
- Measure(s) of evaluation

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Supervising Employees

What can the supervisor do the rest of the year?

1. Remain knowledgeable about:
 - (a) the employee's position responsibilities and
 - (b) the actual quality and quantity of employee's work
2. Be a Relational Supervisor: caring and conflict-skilled.