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PERFORMANCE MANAGEMENT

A Manager's Guide to the Appraisal Process

- Understand the role and responsibility of the manager in the performance management process.
- o Learn the steps to prepare and plan for the appraisal.
- Understand the importance of providing meaningful feedback to employees.
- o Identify the essential elements of an effective performance appraisal.
- Review the goal-setting process and the roles of the college, the manager and the employee.

CONTENTS

Contents	2
Introduction	3
What is Performance Management?	3
Why (and Why NOT) Performance Management?	3
The program at Davidson	4
The Forms	5
Long Form	5
Hybrid and Short Forms	6
Choosing the Right Form	6
Timeline for Performance Management	7
Scheduling	8
Reviewing Past Performance	8
Tracking Past Performance	8
Soliciting Feedback	9
Job Description	9
Performance Goals and Previous Review	10
Self-Assessment	10
Drafting the Review	11
What to include	11
What NOT to Say	11
Rating Scales (Hybrid and Short Form Only)	12
Common Errors in Performance Reviews	13
The Meeting	14
Icebreaker	14
Active Listening	14
Difficult Conversations	15
Goals	15
Drafting Goals	16
Sample Goals	18
The Responsibility of the Manager	19
Next Stens	19

INTRODUCTION

In the fall of 2007 a Performance Management Work Team was created to design an effective and sustainable program for performance management. The work team included team members from each division, nominated by the Vice Presidents, and consisted of a mix of supervisors, non-supervisors, salaried and hourly employees.

The work team met for six months and presented drafts of Performance Review forms for use beginning in the 2008-2009 review cycle. The forms we use today evolved from the team's conversations and represent the thoughtful work and dialogue of a cross-section of the Davidson College community. Through the process the team had the following goals in mind:

- 1. To facilitate a work environment at Davidson that allows people to perform to the best of their abilities.
- 2. To create an ongoing cycle for performance management including clear processes and consistent application, rather than a one-time annual event.
- 3. To provide a system of two-way communication that focuses on coaching and employee development while fostering an environment where feedback and critique are healthy.
- 4. To design tools to drive the process, recognizing both the varying needs on campus and the desire for consistency.
- 5. To connect performance management to the college's strategic plan and individual job descriptions.

WHAT IS PERFORMANCE MANAGEMENT?

Performance Management is a formal assessment of how well an employee is doing with respect to annual goals and his or her job description. Additionally, it is an annual opportunity to set future goals and evaluate what, if anything, the employee needs in the way of support to be successful at Davidson.

WHY (AND WHY NOT) PERFORMANCE MANAGEMENT?

Performance Management creates a two-way conversation between the employee and the supervisor. The focus of the process is on coaching and development for the employee rather than the document for the personnel file. The forms are simply tools to help drive the review process and encourage regular performance conversations.

Performance Management is also important from a legal perspective. Performance reviews are standard evidence in discrimination lawsuits filed by employees terminated for poor performance.

While the performance review is considered in preparing annual salary increases, the appraisal does not need to be scheduled in close proximity to the salary review. A focus on how the review and subsequent ratings will impact salary may distract the employee from the message of the review and goals for the future. Again, the performance review is the beginning of an on-going conversation and not only a means to a salary conversation.

Performance Performance Review **Planning** Prepare for discussion Establish goals Complete self-assessment Set standards and and review form expectations Obtain signatures Discussion with employee, constructive feedback Performance Execution and Interim Check-In •Observe Performance throughout year Check performance against goals and duties Ongoing coaching and feedback

THE PROGRAM AT DAVIDSON

The Davidson program may differ from programs used previously at Davidson or at other organizations and businesses in a number of ways

- The Davidson Performance Management System provides consistency but also flexibility in three versions of the review forms. Managers may make individual decisions as to which form to use with guidance available from Human Resources.
- Individual divisions or departments determine the appropriate timetable for performance reviews based on the unique work schedules of the different work areas on campus.

- The steps and forms to be completed during the performance management process are clearly outlined, and Human Resources is available to provide support at any time.
- Training is available for any manager or supervisor charged with completing performance reviews, and employees are provided with instruction on their role in the performance management process.

THE FORMS

Acknowledging the different types of positions on campus and differing management styles, Davidson has provided three different forms for Performance Management. The options include a long form (paragraph style), a short form (check box style) and a "hybrid" form (check box plus comments) to meet the needs of different groups.

	Long Form	Hybrid Form	Short Form
Option for Self-Assessment	V	√	√
Supervisor's Commitment	√	1	1
Performance Summary	√	1	1
Review of Performance	√		
Strengths	√		
Opportunities for Growth	√		
Mid-year check in	√	1	1
Employee Comments	√	1	1
Check Boxes for Competency Areas		1	1
Check Boxes w/ space for feedback		1	
Check Boxes for supervisory skills		1	
Future goal setting	√	1	1

All three forms include several critical components:

- Option for employee self-assessment (using a copy of the same form as the manager)
- Supervisor's Commitment to guide the success of the employee
- Performance Summary
- Signature sheet (with mid-year check in and employee comments)
- Goal-setting for the next year

LONG FORM

The long form includes a series of open-ended questions to assess an employee's past performance and begin the process of goal-planning and setting performance expectations

for the future. The long form is ideal for reviewing managers and administrators with job duties not easily captured with pre-assigned competency areas.

Managers should plan to complete the comments form for ANY competency rated below average. Even if not drafted, managers should be able to able to articulate a justification verbally at the meeting for every ratingincluding a means for an employee to move from meets to exceeds.

HYBRID AND SHORT FORMS

The Hybrid Form and the Short Form both include a list of competency areas applicable for employees. The list includes those areas that are a part of almost every job description on campus. Additionally, the forms include two job specific competencies (but more could be added for a specific job).

The Hybrid Form includes an additional page for employees who supervise others. This page may be removed for non-supervisory roles. The Short Form does not include a supervisor section and is not the right form for any employee with management responsibilities.

The most distinguishable difference between the two forms is the "Comments and Suggestions for Improvement" section of the Hybrid Form. This field can be a critical opportunity to give support to a rating—high or low—and to give the employee opportunities for growth by specific competency.

Both forms include two open-ended fields from the long form—the "Performance Summary" and the "Supervisor/Manager's Commitment." All three forms also have an identical signature sheet.

CHOOSING THE RIGHT FORM

Managers can make their own decision as to the form to use for their employees. While a different form can be used for people in the same division, the same form should be used for all people in the same or similar roles within a department.

All employees with responsibility for managing others should be reviewed with the long form or the hybrid form. If using the hybrid form for managers, the page with check boxes for supervisory skills should be included as part of the review.

Managers should review all three forms prior to making a determination as to which form to use. Should a manager determine after the fact that a different form would have been more useful for a particular group of employees, he or she can change forms the following year.

IN SUMMARY:

- 1. Long Form (open-ended)
- 2. Hybrid Form (Competency Ratings with Feedback)
- 3. Short Form (Competency Ratings)

TIMELINE FOR PERFORMANCE MANAGEMENT

1 Month Out: Schedule

- •Give an employee plenty of notice at a time convenient for all
- Schedule 2 meetings if review and goal setting to be done separately
- When scheduling, give employee link to the self-assessment
- •Find a private location for the conference

3 Weeks Out: Review the Year

- Consider the FULL year
- Review past performance documentation in desk file
- •Review past goals and attach or paste into review form
- Review Job Description
- •Solicit input from people to whom the employee provides service

2 Weeks Out: Draft the Review

- •Choose the correct form
- Draft the review, including Supervisory Addendum if employee supervises others
- •Let it sit and re-read a week later
- •Include only facts and work-specific information

Day of: Meeting with Employee

- Review the Supervisor's draft of the Performance Review
- •Review the Employee's Self-Assessment
- Review goals (if not scheduled for separate meeting)

Within One Week: Follow-up

- Make any changes to the review discussed in meeting and give employee revised copy
- •Sign forms with employee and allow a response if requested by employee
- •Conduct the meeting about goals (if not done at Performance Review)

Within 2 Weeks: **Next Steps**

- Submit to Manager/VP for review
- Submit to Human Resources for file
- Save a copy in your "desk file"
- Schedule 6-month mid-year check in (and create Outlook reminder)

Remember: It is ALL in the

PLANNING!

SCHEDULING

An important philosophy of Performance Management: it is all in the planning! In the weeks before the actual meeting, the manager is scheduling, preparing and drafting. The employee also has a responsibility to review his or her own performance during this time.

The steps in the scheduling process include:

- 1) Provide plenty of **notice** of the Performance Review—at least two weeks. *Note: If the review and goal setting will be done separately, set two meetings.*
- 2) Set the meeting at a time that is convenient for all attendees.
- 3) Reserve **meeting space** when scheduling the conference if you do not have access to a private office. The conference room in Human Resources is available, if needed.

4) Provide the employee with a copy of the form for his or her **Self Assessment** or send a link to the online form.

IN SUMMARY:

- **Notice**
- Convenience
- Location
- Self-Assessment

REVIEWING PAST PERFORMANCE

The annual performance review should assess an employee's work over an entire year, not just the month prior to the review. While trends in performance should be noted, the review should include any issues since the prior year's review.

The first rule of Performance Management: nothing should be a surprise to an employee (or supervisor) in a performance review. If the manager is doing his or her job, the employee will already recognize any existing weaknesses through coaching and counseling over the course of the year. A high-performing employee will have been praised for a job well done and be aware of his strengths. And BOTH of these areas will be documented!

TRACKING PAST PERFORMANCE

Managers may have a range of documentation on each employee. Managers should have a system to track performance of employees in what is generally called a "desk file." The file may be in paper or electronic form but should be secure and accessible only by the manager (a locked desk drawer for hard copies, and in a password-protected folder for electronic copies).

An alternative means of tracking performance is a "performance calendar." Conversations with employees, notes on incidents etc., can be recorded in a calendar to provide recall of events throughout the year.

In both cases, include positive and negative items. If your employee earns an award or receives a positive customer service note, include it in your file! Formal documentation, including written warnings (or positive service awards) should also be sent to Human Resources for inclusion in the employee's formal personnel file.

Documentation is important, especially for negative performance reviews. The documentation demonstrates that the issues are based on fact, and not just on memory. Managers should have documentation to support any low score.

The **1**st rule of

Performance Management:

Nothing should be a surprise.

SOLICITING FEEDBACK

360-degree feedback is a method of assessing the full circle of an employee's work by soliciting feedback on performance from a range of sources. This can include subordinates, peers, managers, customers, vendors and self. Managers understandably often don't have time to do a full 360° evaluation of every employee. However, the most effective performance reviews will contain both praise and constructive criticism if possible beyond the observations of the individual manager. Solicit feedback from several sources to better assess the employee's body of work.

Examples of questions to ask of others include:

- Describe the collaborative interactions you have had with the employee this year.
- What worked best in your working relationship with this employee over the past year?
- What specific contributions or strengths did the employee bring to the project?
- What could the employee do that would make your working relationship stronger?
- What additional comments do you have about the job performance of this employee?

Be sure to filter the information for the review using only the factual and objective information—avoid subjective responses or anything of a personal nature. Typically the identity of the reviewer is kept confidential—but it can be shared with the reviewer's permission.

JOB DESCRIPTION

An employee's performance should be based on the competencies outlined in the job description. Therefore, it is good practice to have a copy of the employee's job description on hand while drafting the review and during the performance review conference.

Missing the job description? Please contact Human Resources for assistance.

If during the performance review process it becomes apparent that a job description needs modification, contact Human Resources. It may be as simple as changing the language of the job description and modifying the document in the records. On the other hand, if the changes are substantial, the manager may need to do a job reclassification review.

NOTE: Changes to the job description must be reviewed and approved by the Department Director and Human Resources and then forwarded to the Division Head.

PERFORMANCE GOALS AND PREVIOUS REVIEW

The manager should have a copy of the goals from the previous year as they should determine much of what is evaluated in this year. While goals may be adjusted throughout the year as circumstances change, the employee and the manager should both have updated versions of the goals at the time of the review.

The performance review from the previous year can also be reviewed to assess past performance. While the employee should not be rated on actions in the prior year, any identified opportunities for growth from the previous review should be noted. Did the employee make improvements in identified areas of weakness?

SELF-ASSESSMENT (OPTIONAL)

Each employee may complete a self-assessment using the same form as the manager. The employee's version of the appraisal allows the manager to see how the employee perceives the year and his or her own strengths and weaknesses. In the Davidson system, it also begins the conversation as to what the manager can do differently.

Managers should provide a copy of the form and give the employee the option of completing the self-assessment. In advance of the performance review, the manager may want to go over the form itself and review the questions on the review and definitions of the rating scales.

The employee should bring the self-assessment to the meeting for discussion. The self-assessment may be turned in as part of the review, or the final review may be modified to include portions of the employee's own assessment.

IN SUMMARY:

- Past Performance Documentation (Positive and Negative)
- 360-Degree Feedback
- Job Description
- Performance Goals and Previous Review
- Self-Assessment

DRAFTING THE REVIEW

Once all materials have been gathered and reviewed, the manager faces the most difficult task of the performance review process—the drafting of the review.

Managers should begin drafting the review several weeks in advance and then step away from it for a few days. In the case of a negative review, consider having your supervisor or someone in Human Resources review the document.

When using the short form or the hybrid form, it is good practice to provide supporting examples for any rating that is below the "Fully Achieves" level. Managers should be prepared with concrete examples to support all ratings, even if it is not included on the review form.

For many managers, drafting the review is the hardest part of the process. Managers should

leave plenty of time in the process to write a draft and have time to review and edit.

WHAT TO INCLUDE

The second rule of Performance Management: It is all in the details. A performance review can't be a 100 page document, but it must contain enough detail and specificity to support the

The **2**nd rule of

Performance Management:

It is ALL in the details.

ratings and give the employee a clear picture as to what to continue doing and what to change. Additionally, the review should be objective and based on facts. A few recommendations:

- Support each rating or recommendation with examples and facts
- Include strengths and **constructive** criticisms
- Be honest and consistent
- Include examples of work from the whole year
- Use the employee's goals and job description as the basis for the review
- Consider feedback received from coworkers, clients, and direct reports
- Give specific, concrete examples of problem areas, rather than generalities
- Separate the person from the behavior and performance

WHAT NOT TO SAY

The Performance Review should be a document that can help the employee and the manager set the stage for the coming year, but it is also a potential piece of evidence in a employment lawsuit. Consequently, the performance review should be carefully drafted to avoid even the suggestion of inequity, or unfairness that could result in a legal challenge.

• No negative surprises—refer to First Rule of Performance Management—nothing new in the performance review!

- Do not focus only on the few weeks prior to the review—look at the whole year
- Avoid opinions and subjective evaluations
- Eliminate any references to personal family or health situations
- Do not give identical comments and ratings for every category or every employee

RATING SCALES (HYBRID AND SHORT FORM ONLY)

The rating scale includes 5 different groupings. A five-groupings system should provide managers enough choices for an accurate selection among the different statements. It should not, however, simply allow managers to rate employees across all competencies with the middle option--perceived by managers and employees as "average." Managers need to review with the employees the different ratings and their accompanying description and understand the each varying option.

Description	Description
Rarely Achieves (1)	Results significantly below standards, requirements and expectations; Consistently failed to demonstrate effort, focus, and resourcefulness required; Unsatisfactory quality of work; Substantial correction or reassignment of work required; Needed frequent follow-up and close supervision
Sometimes Achieves (2)	Results approached but typically did not meet standards, requirements and expectations; Inconsistently demonstrated effort, focus, and resourcefulness required; Inconsistent quality of work; Excessive correction required; Needed more than the appropriate level of follow-up and supervision
Fully Achieves (3)	Results met standards, requirements and expectations; Demonstrated effort, focus, and resourcefulness required; Solid quality of work; Minimal correction required; Needed appropriate level of follow-up and supervision
Sometimes Exceeds (4)	Results were sometimes beyond standards, requirements and expectations; Demonstrated effort, focus, and resourcefulness beyond level expected; Superior quality of work; Little or no correction required; Needed less follow-up and supervision than is typical for someone in the role
Consistently Exceeds (5)	Results were consistently and significantly beyond standards, requirements and expectations; Demonstrated effort, focus, and resourcefulness significantly beyond level expected; Work serves as example for quality; No correction required; Needed much less follow-up and supervision than is typical for someone in the role

Managers should reflect on an employee's work independently for each competency area. An employee who is weak in one area may be strong in another. Failing to recognize an employee's strengths can make it difficult for an underperforming employee to see a reason to improve.

The resulting scores are not averaged for a final score and the results do not translate into a formula to determine pay raises. Competency areas have different importance in different, positions and employees have unique strengths and weaknesses.

If a particular competency area does not apply to an employee, a manager should cross through that duty on the form (or edit the form if completing online) rather than giving a score on a competency area for a duty not in the job description. This does not preclude, however, the manager from giving a good score to an employee for going "above and beyond" in an area outside the outlined duties.

COMMON ERRORS IN PERFORMANCE REVIEWS

Managers often make mistakes in performance reviews due to their own biases—many of which we aren't even aware of! The following are common errors that occur in evaluating the performance of others.

First-Impression (or Last Impression) Error—Be sure to look at the whole year and the full body of work when completing an evaluation. For an employee that may have been a poor performer in the past, be sure to acknowledge improvement. The same can be true with someone that started strong. If performance has declined, be sure to acknowledge it. In either case, don't let an employee's most recent actions, positive or negative, negate a year's worth of work.

You're the Best!—Just because someone excels in one area doesn't mean they don't have faults! Be sure to address all aspects of an employee's performance, including those areas a star employee doesn't accomplish as well. This includes evaluating each competency separately and honestly. Evaluate each employee individually and not in comparison to others on the team.

The Blind Spot—Remember that "Like likes like." We tend to appreciate coworkers and employees with similar traits to our own—whether it is Myers-Briggs type or hometown! Be sure to focus on behaviors rather than personality traits of individual employees. Similarly, managers with a particular weakness will often excuse that weakness in others. Managers must evaluate themselves to honestly evaluate their employees.

I Don't Like—Just because someone has a weakness, don't fail to notice where he or she is strong. This is particularly difficult when we are assessing someone with a dramatically different skill set from our own. Base the review on the duties and goals outlined and not on personality traits. In this situation, a 360-degree assessment from colleagues who work closely with the employee can balance any biases on the part of the manager.

IN SUMMARY:

- Write a draft
- Wait a few days before final draft
- Review "Dos and Don'ts"
- Avoid Common Mistakes

THE MEETING

Like any important meeting, preparation will make all the difference. Before the meeting begins, be sure to have all the necessary documents including:

- Completed review form
- Job description
- Employee goals and/or previous performance review
- Documentation

The meeting should also take place in a private location with enough time blocked off for a meaningful conversation.

ICEBREAKER

The third rule of performance management is to make the honest conversation between the manager and the employee the most important part of the review. To ensure both parties are comfortable talking, take a few minutes to break the ice and relax. Employees AND managers can come into

The **3rd** rule of Performance Management:

The most important part of review is the honest conversation between the manager and the employee.

performance review meetings nervous—even when the review is mostly positive! Setting a tone that relaxes everyone will lead to a more productive conversation.

ACTIVE LISTENING

While the manager is responsible for presenting the review to the employee, remember the goal of the review is the honest conversation. In a successful review, the manager is only speaking 25% of the time. The remaining time is spent asking questions and actively listening to the employee.

"Active listening" is simply listening for meaning. Focus on what the employee is saying and encourage the employee to actively participate in the discussion. Find out what is important to the individual or what they value (work load, recognition, autonomy, work variety, frequency of feedback, etc.)

DIFFICULT CONVERSATIONS

Managers should maintain a positive and constructive attitude throughout the performance review meeting. While performance reviews consider the past, in many ways they are documents that look to the future. Even for employees with performance issues, the review should see turn the issues into opportunities for the future. The low performing employees should be aware of their performance issues prior to any performance review.

If a manager is concerned that a performance review is going to be difficult, he or she should contact Human Resources for assistance. The Human Resources staff can loan managers books on conducting difficult conversations and performance reviews for poor performing employees. The staff in Human Resources is also available to role-play a performance management meeting or to sit in on a conference if necessary.

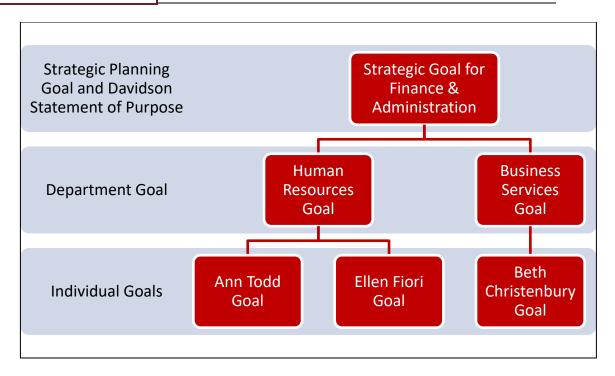
For all reviews, the manager should be prepared with concrete examples to support any ratings and advice for the employee as to how to improve (or maintain) a rating. Do not get pulled into an argument with the employee. Managers should remain focused and avoid dwelling on all of the negative issues. Remember that the review will contain nothing new!

Managers should end each performance review on a positive note, reflecting on the opportunities of the future and a joint course of action for the manager and the employee.

GOALS

Setting goals for yourself and your employees is one of the most essential functions for a manager. Goals are not simply the activities an employee completes as part of the job. Instead, goals are measureable objectives to define the upcoming year. Goals can also identify and correct performance problems and enable identification of top priorities.

Goals are very much a top-down issue—individual goals are based on the goals of the department and division which are in turn driven by the strategic plan and overall Statement of Purpose of the college.



At the same time, goals are the result of a two-way communication between the manager and the employee. Employees will be more committed to projects and goals they own, and their participation in the goal-setting process is critical. The process of setting the goals and conversation between the employee and manager are equally as important as the goals created.

Goals are individualized for each employee—even if there are a number of employees with identical job descriptions. Goal setting is an opportunity to consider the unique skills and needs of the workforce. While most goals will be job specific, employees should be encouraged to include skill and personal development goals as well.

DRAFTING GOALS

In drafting goals, keep in mind the concept of SMART Goals:

Specific (who, what, when, where, why, how)

Measurable (means to determine success)

Achievable (not easy—challenging but attainable)

Relevant (aligned to the overall goals of the college/division/department)

Time-bound (assigned a deadline or span of time to achieve the goal)

While SMART goals are ideal, making goals too specific is not only time-consuming but also will end up requiring an increasing number of goals due to the narrowing objectives. Likewise, do not discount a goal simply because improvement is hard to measure.

Goals are often set at the same time as the performance review from the previous year. But managers and employees should view goals as a guide to performance rather than a tool simply for evaluating performance.

EXAMPLE A

- 1) Communicate with Annual Fund volunteers. (not specific enough)
- 2) In keeping with the strategic goal of the College Relations Division to raise \$7 million for the annual fund and the importance of volunteers and alumni in the process, communicate with every annual fund class chair volunteer each month by phone or by email as appropriate, with at least one phone call per volunteer during the calendar year, separate from any mass communications or newsletters distributed to all volunteers or chairs. Track the communications as appropriate. (too specific)

CHANGE TO:

3) Make one email or phone call personal contact (i.e. not a newsletter) per month with each Annual Fund class chair volunteer. (just right)

EXAMPLE B

1) Improve the department website.

CHANGE TO:

EXAMPLE C

1) Be more efficient.

CHANGE TO:

EXAMPLE D

2) Communicate with respect.

CHANGE TO:

SAMPLE GOALS

The following examples demonstrate a range of goals and measurements. Note goals for higher levels of management tend to be more general, whereas goals may be very specific for positions with less autonomy.

WORK ETHIC

- Arrive at meetings on time so as not to inconvenience other participants.
- Clock in and out in accordance with college procedures 100% of the time.
- Generate at least two ideas to help the team improve productivity.
- Respond to emails and phone calls from alumni within 24 hours of receipt.
- Draft emails for mass distribution free of typographical or spelling errors with 95% accuracy.
- Type and distribute minutes from committee meetings within three days.
- Prepare job aids and reminders for staff and post them in visible areas by October 1.
- Reduce the number of complaints from customers by 10%.

TEAM AND COMMUNITY

- Volunteer to help with at least one program involving students in the calendar year.
- Serve as a mentor for one year to the new hire in the department.
- Assist in projects outside of own job responsibilities to help the department achieve its goals.

LEADERSHIP

- Play a facilitating role in team meetings to encourage other team members to participate as measured by a survey of the team.
- Balance staff workloads so that more projects are completed on time this year than last.
- Reduce cancelled and rescheduled meetings with team members by 20%.
- Recognize employee contributions publicly and document consistently for inclusion in reviews.
- Show confidence in staff by delegating important work to them.
- Organize half day staff retreat to draft departmental five year strategic plan by April.

PERSONAL DEVELOPMENT

- Attend a management/leadership training program offered by Human Resources each month for professional development.
- Complete and pass a course on Excel by November 1.
- Volunteer for one committee of the national professional organization.

THE RESPONSIBILITY OF THE MANAGER

As previously mentioned, managers and employees negotiate performance goals together. To that end, managers must understand their role in supporting the employee to achieve the identified goals. As part of the planning process, the resources and support of management are included on the goals document.

Should the manager fail to provide the support as indicated in planning, any unmet goals are tied to the manager and not the employee.

Goal Planning

List professional goals and objectives for the coming year. Goals should be SMART (Specific, Measurable, Achievable, Relevant and Time-Bound).

What can the supervisor do to support the employee in achieving the goals for the coming year? (Resources or professional development, such as books, seminars, conferences, training, mentoring, feedback, advocacy etc.)

NEXT STEPS

By the end of the performance review, the manager and the employee should agree upon a specific course of action for the coming year. But the responsibilities of the manager do not end at the conclusion of the review.

If the employee requires any assistance or the manager agreed to provide specific support, the manager must follow up.

The 6-month check in should be roughly scheduled at the time of the performance review. Follow up should occur even sooner for low performing employees.

The 6-month check in is a chance for the employee and supervisor to discuss how things are going. Are we on track for the rest of the year? Are more resources needed to accomplish the goals set? It is also a time for the supervisor to let the employee know where, via the rating system, they stand – what they are doing well and what, if anything, needs improvement.