

SKIDMORE

SUPERVISOR GUIDELINES: ANNUAL PERFORMANCE REVIEW PROCESS

Performance Planning - The supervisor and employee meet to plan the upcoming year. In their discussions they agree upon:

- Goals & Objectives for the coming year (both goals to help the department meet its objectives, as well as personal developmental goals).
- The Job Description should be reviewed regarding the employee's responsibilities for results that will be measured as part of their performance.
- The performance factors – competencies or behaviors that will be important in determining how the results will be achieved.

- **Successful** (*Demonstrates Skidmore Employee Competencies. Contributes to a welcoming and inclusive environment where colleagues feel heard, empowered, and have a sense of belonging. Demonstrates people skills with strong engagement and contributions to the team. Performs all aspects of the job function, responsibility, or goal. Recognizes, participates in, and adjusts to changing situations and work assignments. Achieves results in changing environments. May contribute beyond the scope of the job and team. May exceed requirements by achieving results in complex, unordinary circumstances. May exceed requirements or may require improvement in one or two areas.*)
- **Currently Not Successful** (*Does not successfully demonstrate Skidmore Employee Competencies. Poor relationship management; may impede the work of others and the unit. Performs below established job requirements. Resists opportunities and challenges and fails to show initiative to make changes.*) This rating requires a conversation with HR. Consider a Performance Improvement Plan or disciplinary action.

Performance Review Discussion - Before the Performance Review discussion, the supervisor should consider the following:

- Schedule a mutually convenient time and place for the discussion at least one week in advance.
- Avoid surprises. Explain the purpose of the meeting to the employee and give the employee your written evaluation approximately 1 day prior to the discussion, to give them time to read it and prepare for a meaningful discussion.
- Allow enough time for a two-way discussion (approximately 1 hour).
- Ensure that there will be no interruptions (phone calls, email, etc.).
- Anticipate the employee's reactions, both positive and negative, and think through your potential responses.

Steps to consider in the discussion:

- Demonstrate respect and seriousness for the process.
- The employee should feel that nothing is more important to you than their performance review right now; be on time; verbalize how important this meeting

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- Make two copies of the signed document for the employee and your records. The original is sent to Human Resources for the employee's personnel file.
- If there is a performance issue, clearly explain the next steps (e.g., agreed upon follow-up review, special weekly or monthly meetings, additional training, etc.)
- End with a positive comment and thank the employee for their contributions to Skidmore.

FOR ASSISTANCE - Contact your supervisor and/or Human Resources for support in writing and delivering effective performance reviews, coaching, suggestions and policy obligations.