



WHITMAN COLLEGE

Reimagining Performance Management

STAFF TRAINING

March 2022

Today's goals

- The value of effective performance management
- 3 components of performance management
- Whitman's new performance management model
- Timeline of performance management process
- Using BambooHR for performance management



Performance Management is a **PROCESS**, that:



- Involves **communication** between a supervisor and an employee
- Is **ongoing**
- Ensures the work we do is **in support of accomplishing** the goals of our department
- Helps employees fulfill their **potential**



The dreaded annual performance review

- It takes time & effort.
- They are often overly complicated.
- “Formal” feedback can be scary and anxiety-producing.
- It is frequently out of context because of lag time.



Annual reviews are losing relevance

- Fewer organizations are using annual reviews:
 - 2016: 82%
 - 2017: 65%
 - 2018: 58%
 - 2019: 54%
- Effective feedback is:
 - timely,
 - frequent, and
 - a continuous process
 - that engages employees.



Good performance management adds tremendous value

- Helps satisfy our desire as employees to grow and develop.
- Improves communication between employee & supervisor.
- Aligns our work with our department and institution.



3 components of effective performance management

1. Ensuring departmental core values & priorities drive our work
2. Assessing performance
 - Performance assessment
 - Feedback from others
 - Ongoing conversations between supervisors and employees
3. Goal setting



Assessing performance

(1) ASSESSMENTS

- Employee self-assessment
- Supervisor assessment

(2) FEEDBACK FROM OTHERS



What should assessments measure?

PERFORMANCE

- Measures where someone has been and where they currently are.

ENGAGEMENT

- Understanding engagement helps make sense of the future.



Feedback



Feedback from others

- Feedback from others creates the opportunity to put together the whole picture.
- It is important for feedback to be given anonymously and for supervisors to protect anonymity.

Performance conversation

- One-on-one conversations between employee and supervisor to talk about assessments
- Entering the conversation in right frame of mind & being prepared
- Assessments & feedback drive goals setting



Setting goals

- Goals should be established collectively.
- Make sure goals align with core values, priorities, and areas that need improvement in performance and/or engagement.
- Find ways for goals to leverage your strengths & talents.
- Document your goals and regularly revisit in one-on-one meetings with your supervisor.



Setting goals

Make sure goals are SMART:

- Specific
- Measurable
- Attainable
- Relevant
- Time bound



Whitman's new performance management model

1. Assessment
 - Self-assessment
 - Supervisor assessment
2. Performance review conversation
3. Feedback invitation
 - Feedback from 1-10 others (make sure to include employees of supervisors)
4. Goal-setting
5. Ongoing one-on-one conversations to share peer feedback & monitor performance, engagement, and goal progress.
6. Repeat (every 4 months).



Timeline

- Apr. 1: Assessments go live in BambooHR
- Apr. 1 – Apr. 30: BambooHR sends email reminders
- May 1: Assessments close
- Month of May: Performance review conversations
- Mid May – mid June: Others provide feedback
- July: HR invites your feedback about the process
- Aug. 1: The process begins again!

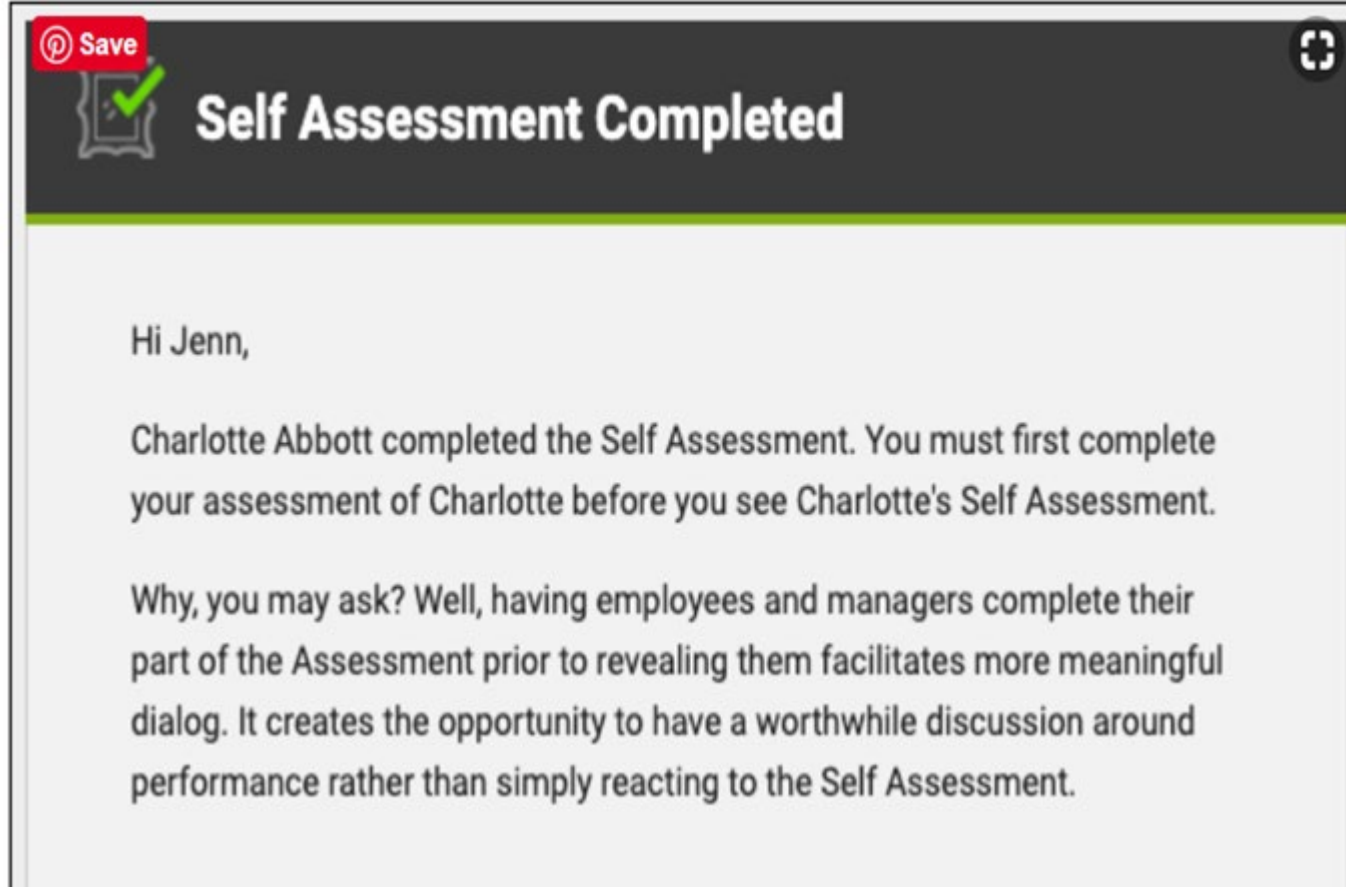





Self-assessment

The screenshot displays a performance management interface. On the left is a sidebar with contact information (415-555-1273 Ext.1272, 415-555-8964), hire date (Jul 17, 2014), full-time status, and manager information (Jenn Caldwell). The main area is titled 'Performance' and includes a navigation bar with 'Goals' and 'Assessment' (highlighted with an orange box). A 'Review Period' dropdown is set to 'Jun 16, 2018 - Sep 15, 2018'. The 'Self Assessment' section contains three questions with text input fields: 'How well does Helpcontent recognize my value?' (response: 'I feel I am highly valued.'), 'What would have the greatest impact on my ability to do my best work more often?' (response: 'Nothing, I have all I need.'), and 'What are some things I do well?' (response: 'I am great at seeing the big picture and at delegating work to my team.'). A fourth question, 'How could I improve?', has a response: 'Make sure I am fully understanding the feedback from my peers and team to ensure I am doing my best work.' At the bottom are 'Submit' and 'Save & Finish Later' buttons. To the right, a 'Manager Assessment' section is currently empty, showing a placeholder message: 'Manager Assessment will show here once completed.' with a compass icon.



Self-assessment



 Save  **Self Assessment Completed** 

Hi Jenn,

Charlotte Abbott completed the Self Assessment. You must first complete your assessment of Charlotte before you see Charlotte's Self Assessment.

Why, you may ask? Well, having employees and managers complete their part of the Assessment prior to revealing them facilitates more meaningful dialog. It creates the opportunity to have a worthwhile discussion around performance rather than simply reacting to the Self Assessment.



Supervisor assessment

The screenshot displays a performance assessment interface. On the left is a sidebar with contact information (415-555-1273, 415-555-8964), hire date (Jan 14, 2020), and manager details (Jenn Caldwell, VP of People). The main area is titled 'Performance' and includes tabs for 'Goals', 'Feedback', and 'Assessment' (the latter is highlighted). A 'Review Period' dropdown is set to 'Oct 2, 2019 - Nov 30, 20...'. Below the tabs, a 'Self Assessment' section is shown as locked with a padlock icon and the text 'Complete the Manager Assessment to unlock this Self Assessment.' To the right, the 'Manager Assessment' form is visible, containing questions about job offers, engagement, and performance. A 'Submit' button is at the bottom right, with a 'Saved (7 days left)' indicator.

415-555-1273 Ext. 1272
415-555-8964

Hire Date
Jan 14, 2020
10d

1
Full-Time
Human Resources
North America
Lindon, Utah

Manager
Jenn Caldwell
VP of People

Performance

Goals Feedback **Assessment** Review Period Oct 2, 2019 - Nov 30, 20...

Self Assessment
Completed: Jan 23, 2020 at 10:53 AM

Complete the Manager Assessment to unlock this Self Assessment.

Manager Assessment

Charlotte WILL NOT SEE Your Answers to These 2 Questions

If Charlotte got a job offer elsewhere, I would... *

Do everything I could to keep Charlotte. We'd b... x v

How engaged is Charlotte at work? *

Good engagement and a mostly positive attitude. x v

Charlotte WILL SEE Your Answers to The Following Questions

What are some things Charlotte does well? *

Charlotte is great at managing her team. She is really focused on getting her job done, and improving the work life of employees at her location.

How could Charlotte improve? *

Sometimes Charlotte is te for work. This adds unneeded stress to her day as she is very busy.

Submit Saved (7 days left)



Feedback from others

Hi Charlotte,

Please take a few minutes to **provide feedback about Daniel Vance**.
Share your insights into what Daniel does well and help identify opportunities for improvement.

 **The deadline for submitting this feedback is Feb 8.**

 **Daniel will not see your feedback.**

Give Feedback

Powered by 



Feedback from others

The screenshot shows a web interface for 'Requests'. On the left is a sidebar with categories: 'Inbox (8)' (containing Approvals (2), Timesheets (2), Signatures (1), and Feedback (1)), 'Completed', and 'Sent'. The 'Feedback (1)' item is highlighted with an orange box. The main content area is titled 'Please provide feedback about Daniel Vance' with a 'Due in 15 Days' indicator. The feedback form itself has a dark header 'Please Provide Feedback about Daniel'. The text inside reads: 'Hi Charlotte, Please take a moment to answer the following two questions about Daniel Vance. Your feedback will help Daniel know what to continue doing and how to improve--so please share what you feel will be most helpful. Oh, and don't worry Daniel will never see what you write.' Below this is a warning: 'Limited time only... This Feedback must be completed by Feb 8.' The form identifies 'Daniel Vance' as 'VP of Sales' from 'Lindon, Utah'. A yellow highlight under the name states 'Daniel WILL NOT see this feedback.' There are two text input fields: 'What are some things Daniel does well?' and 'How could Daniel improve?'. A 'Submit Feedback' button is at the bottom.





Goal setting

The screenshot displays a performance management interface. On the left is a sidebar with contact information (415-555-1273 Ext. 1272, 415-555-8964), a hire date of Mar 13, 2020 (1y - 1m - 7d), and a manager profile for Jenn Caldwell, VP of People. The main area is titled 'Performance' and includes tabs for 'Goals', 'Feedback', and 'Assessment'. A '+ New Goal' button is highlighted with a red box. Below this, a goal is shown: 'Increase retention by 5% before the end of Q1', which is 'In Progress' and due on Mar 31. The goal aligns with 'Review Performance results and share with the C-Suite' and 'Research trends in terminations and deep dive into ways we can improve.' A comment from Olivia Sterling, dated Jan 23, 2020 at 10:25 AM, asks for an update by the end of January. An 'Add Comment' button is visible below the comment.




Goal setting

 Add a New Goal

Your New Goal mm/dd/yyyy* 

Short description of what you will accomplish and how.


-Goal Alignment- (Optional) 




Goal setting

Share this goal ✕

Who has access

 Charlotte Abbott ✕

 Ashley Adams ✕

Add People

Add Cancel



Goal setting

415-555-1273 Ext. 1272
415-555-8964

Hire Date
Mar 13, 2020
1y - 1m - 7d

1
Part-Time
Human Resources
North America
Castle Rock

Manager
Jenn Caldwell
VP of People

Performance


Goals Feedback Assessment

[+ New Goal](#) Status: In Progress

Increase retention by 5% before the end of Q1

Aligns with: Review Performance results and share with the C-Suite
Research trends in terminations and deep dive into ways we can improve.

80% Mar 31

 **Olivia Sterling**
Jan 23, 2020 at 10:25 AM
Can you please give me an update on this by the end of January?

[+ Add Comment](#)



Helpful resource

Completing the self-assessment:

<https://www.whitman.edu/human-resources/hiring-managers-and-supervisors/performance-appraisals>

