



WHITMAN COLLEGE

Reimagining Performance Management

SUPERVISOR TRAINING

April 2023

Today's goals

- Creating a culture of giving and receiving feedback
- Whitman's performance management model
- Timeline of performance management process
- Using BambooHR for performance management
- Writing and delivering high quality performance reviews



Why is giving feedback a challenge for so many of us?



Responses we fear from those receiving feedback (from others & ourselves!)

- It takes intention to do so.
- Justify, explain, or blame others.
- Become defensive.
- Focus only on the positives.
- Dismiss or discredit the comments, assuming the person giving the feedback is wrong.
- Feel badly and contribute to low self-esteem/self-worth.
- Focus only on the negatives.
- Assume positive feedback is being offered just to be polite.



What would it look like if we had a culture of effectively giving and receiving feedback?



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What would it look like if we had a culture of effectively giving and receiving feedback?

- We would affirm that our central role as supervisors would be to enable growth in others.
- We would have stronger self-awareness of what we are doing well, what we can do better, and how we can do it better and could maximize our potential.
- We would feel invested in.
- The supervisor | supervisee relationship would be based on care and authentic communication, which leads to trust.
- We would want to have conversations about performance, and performance reviews could be less anxiety-provoking.





What do you do well with regard to providing feedback?



Strategies for effectively providing feedback

- Think about how your identities and those you supervise may impact the giving and receiving of feedback. EX: How does my race matter in the context of providing feedback to someone I supervise?
- Context matters! (History, who is in the room/has been in the room, what's going on in society, what's happening on campus, timing, emotional state of our culture, power dynamics, etc.)
- Be timely.
- FRAME: As your supervisor...
 - I have a duty to contribute to your development.
 - I want to foster a growth mindset – we can all improve, and feedback is a primary way I can help you grow.
 - Any feedback I give you comes from a place of care.
 - My intention in giving you feedback is to help you narrow the gap between where you currently are and where your maximum potential lies.



Strategies for effectively providing feedback

- Be positive & start with the positives.
- Be specific, stick to the facts, and don't make assumptions.
- Speak from your own perspective.
- Focus on things that can be changed; be fair, balanced and realistic.
- Provide specific suggestions on how to improve, and make a path towards improvement a team effort.



Strategies for effectively providing feedback

- Limit constructive feedback to two points in any single conversation so as to not overwhelm.
- Be willing to table the conversation if emotions are high.
- Ask for their reactions. Is this fair?
- Follow up & offer continued support.
- Earn credibility and trust over time, which will then strengthen your ability to give future feedback.



Effectively receiving feedback

- Remember that we need feedback to grow, and receiving feedback from others – including those we supervise – gives us something to grow towards.
- As supervisors, we need to continually share that we want feedback from others.
- Listen without interruption, & think before responding.
- Think positively and be open to helpful hints.



Effectively receiving feedback

- Ensure you understand what is being communicated.
- Show appreciation & that you are invested in the learning process.
- Where appropriate, follow up with whoever provided the feedback.
- Use the feedback matrix to reflect on what you're going to do with the feedback and take some action.



Processing feedback

Positive/expected

- How can I celebrate this aspect of myself?
- How can I use this skill to increase my job satisfaction?
- How can I use this skill to help others who don't have this strength?

Positive/unexpected

- How will I celebrate this newly discovered skill?
- How can I use this skill more to contribute to my job?

Negative/expected

- What actions have I already taken to address this concern? How successful were they?
- What else do I need to change to achieve the results I want?
- If I don't make these changes, how will this impact my professional life?

Negative/unexpected

- What support do I need?
- What plan can I put in place to make small, achievable changes for the short-term?
- How will improving this impact other areas of my job?



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**



Whitman's performance management model

1. Departmental core values & priorities that drive our work
2. Performance assessment
 - Self-assessment & manager assessment: Measures both engagement & performance
 - Feedback from others
3. Performance conversation
4. Goal documentation
5. Ongoing conversations
6. Repeat in 6 months



Timeline

- June/July 1: Assessments go live
- June/July 1: Supervisors invite feedback
 - Spring/summer: supervisees
 - Fall/winter: teammates & colleagues outside of department
- June/July 1-14: Staff provide feedback of supervisors
- June 30/July 31: Assessments close
- Month of July/August: Performance review conversations & goal setting
- July – December/January: Continue working goal monitoring into regular one-on-one meetings
- December/January 1: The process begins again!



Self-assessment

- **What are some things I did well in the prior six-month review period?** Some topics you may consider responding to include: the progress you have made on any goals established for this review period; accomplishments you made; something you are particularly proud of; ways you contributed to the College's core values of diversity, equity, inclusion and antiracism; processes you improved; collaborations you had with colleagues or departments; relationships you developed, and any ways you had a positive impact on your department, etc.
- **In what areas would I like to improve?** Some topics you may consider responding to include: knowledge you would like to acquire, skills you would like to develop, processes you would like to improve, professional development activities you would like to engage in, etc.
- What goals would I like to establish for the next six-month review period?

The screenshot displays a performance assessment interface. On the left, a sidebar contains contact information (415-555-1273 Ext. 1272, 415-555-8964), hire date (Jul 17, 2014), full-time status, and manager name (Jerrin Caldwell). The main content area is titled 'Performance' and includes a 'Goals' tab and an 'Assessment' tab. The 'Assessment' tab is active, showing a 'Self Assessment' form with three questions: '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 'How could I improve?' section contains the text 'Make sure I am fully understanding the feedback from my peers and team to ensure I am doing my best work.' and a green checkmark. At the bottom of the form are 'Submit' and 'Save & Finish Later' buttons. To the right, a 'Manager Assessment' section is visible, featuring a compass icon and the text 'Manager Assessment will show here once completed.'



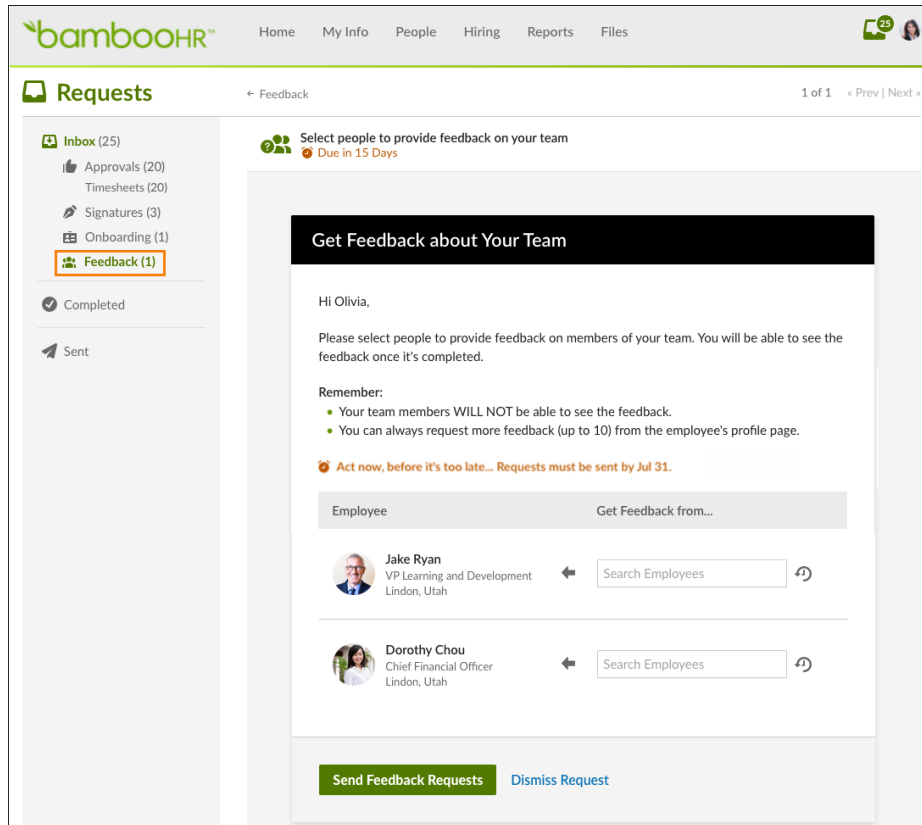
Supervisor assessment

- **What are some things this employee did well in the prior six-month review period?** Some topics you may consider responding to include: the progress they made on any goals established for this review period; accomplishments; ways they contributed to the College's core values of diversity, equity, inclusion and antiracism; processes they improved; collaborations they had with colleagues or departments; relationships they developed, and any ways they had a positive impact on their department, etc.
- **In what areas could this employee improve?** Some topics you may consider responding to include: knowledge they can acquire, skills they could develop, processes they could improve, professional development activities they could engage in, etc.
- What goals could this employee establish for the next six-month review period?
- What do I most appreciate about this employee?

The screenshot displays a performance management system interface. On the left, a sidebar shows employee contact information (415-555-1273 Ext. 1272, 415-555-8964), hire date (Jan 14, 2020), and manager details (Jenn Caldwell, VP of People). The main content area is titled 'Performance' and includes tabs for 'Goals', 'Feedback', and 'Assessment' (the latter is highlighted with an orange box). 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, with a message: 'Complete the Manager Assessment to unlock this Self Assessment.' To the right, the 'Manager Assessment' form is visible, containing several questions and text input fields. The questions include: 'If Charlotte got a job offer elsewhere, I would...', 'How engaged is Charlotte at work?', 'What are some things Charlotte does well?', and 'How could Charlotte improve?'. A 'Submit' button is at the bottom right, with a note 'Saved (7 days left)'.



Feedback from others



The screenshot shows the BambooHR interface for a feedback request. The top navigation bar includes 'Home', 'My Info', 'People', 'Hiring', 'Reports', and 'Files'. The main header is 'Requests' with a sub-header 'Feedback' and '1 of 1' items. A sidebar on the left lists 'Inbox (25)' with sub-items: 'Approvals (20)', 'Timesheets (20)', 'Signatures (3)', 'Onboarding (1)', and 'Feedback (1)'. The main content area is titled 'Get Feedback about Your Team' and includes instructions: 'Hi Olivia, Please select people to provide feedback on members of your team. You will be able to see the feedback once it's completed.' It also lists 'Remember:' points: 'Your team members WILL NOT be able to see the feedback.' and 'You can always request more feedback (up to 10) from the employee's profile page.' A warning states: 'Act now, before it's too late... Requests must be sent by Jul 31.' Below this is a table with columns 'Employee' and 'Get Feedback from...'. Two employees are listed: 'Jake Ryan, VP Learning and Development, London, Utah' and 'Dorothy Chou, Chief Financial Officer, London, Utah'. At the bottom are buttons for 'Send Feedback Requests' and 'Dismiss Request'.

- Questions
 - What does {name} do well?
 - What can {name} improve?
- Spring/Summer reviews: **Focus on inviting feedback from supervisees; if they don't supervise, focus on others in the department.**
- Fall/Winter reviews: Focus on inviting feedback from others in the department and outside of the department.



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.



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



Writing an effective performance assessment

- Make sure you are in the right time & mental space to write the review.
- Be very specific & offer concrete examples.
- Consider how to frame each set of feedback – evaluating, appreciating and coaching.
- As you review the assessment, ask yourself if you have created any surprises.



Writing an effective performance assessment

REVIEW & CHECK FOR BIAS



- Question: How might this feedback be shaped by my own background?
- Do not use assumptions or judgements.
- Run a consistency check with all of the reviews you write.
- Give yourself a word range.
- Is my feedback related to performance or is it personality-based?



Effectively delivering a performance review

- Be prepared & communicate expectations.
- Remind yourself:
 - Feedback involves care and trust.
 - Delivering an effective performance appraisal can lead an employee to feeling listened to and supported.
- Make it conversational & start with the employee.



Effectively delivering a performance review

- Show genuine gratitude.
- When providing constructive criticism, focus on the issue and collectively problem-solve.
- Be prepared that the possibility exists for an employee to not receive constructive feedback well.
- Invite their thoughts/reactions, and invite the employee to raise any final items.
- Summarize, express confidence, and document.



Feedback

- Feedback from others creates the opportunity to put together the whole picture.

- Supervisees (Spring/summer review)
- Team members (Fall/winter review)
- Colleagues outside of the department (Fall/winter review)



- It is important for feedback to be given anonymously.
- Incorporate feedback from others into your supervisor assessment.



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.
- Ensure goals are SMART.
- Find ways for goals to leverage employee strengths.
- Document.



Helpful resources

[BambooHR Guides](#): Whitman/edu/human-resources (under Hiring Managers & Supervisors)

Blanche, A. (2020). [Why Inclusivity Needs to be the Backbone of Performance Reviews](#). Talent Management and HR.

Davis, June Y. (2021). [Strategies for More Inclusive and Effective Feedback](#). SHRM.

Hill, Michael. (2019). [Take off your badge and let's talk](#). Insight.

Mackenzie, Lori N., Wehner, JoAnne, and Correll, Shelley J. (2019). [Why Most Performance Evaluations are Biased and How to Fix Them](#). Harvard Business Review.

Mindtools Content Team. [Giving Feedback](#). Mindtools.

Mindtools Content Team. [The Feedback Matrix](#). Mindtools.

Mueller-Hanson, Rose A. & Pulakos, Elaine D. (2015). [Putting the "Performance" Back in Performance Management](#). SHRM.

O'Connell, Brian. (2020) [Performance Management Evolves](#). SHRM.

