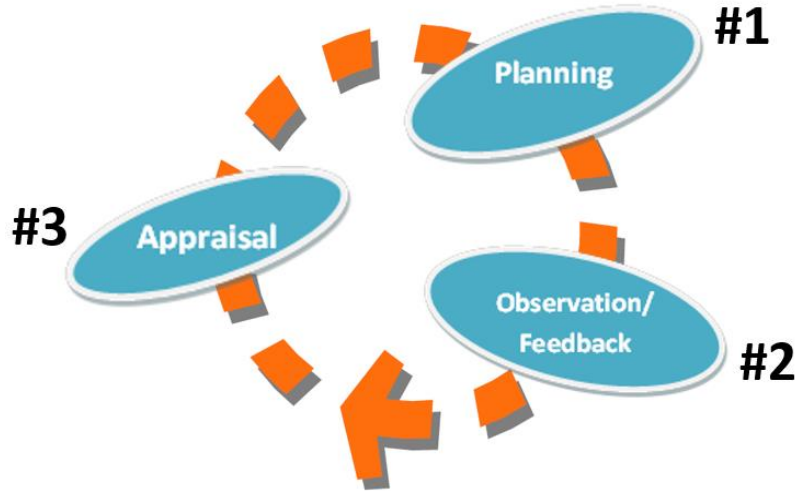


### 3 Phases of Performance Management

### Takeaway Question



How can I, as a supervisor, increase engagement levels?

### Case Study

Job Duties	Developmental Level
General Expectations	Developmental Level

## Planning Step 2: Identifying Strengths

<b>Interests</b>
<b>Rapid Learning</b>
<b>Flow</b>
<b>Glimpses of Excellence</b>
<b>Satisfaction</b>

## Case Study

<b>3-5 Talents/Strengths</b>

## Case Study

<b>1-2 Weaknesses or Challenges that Get in the Way of Excellence</b>

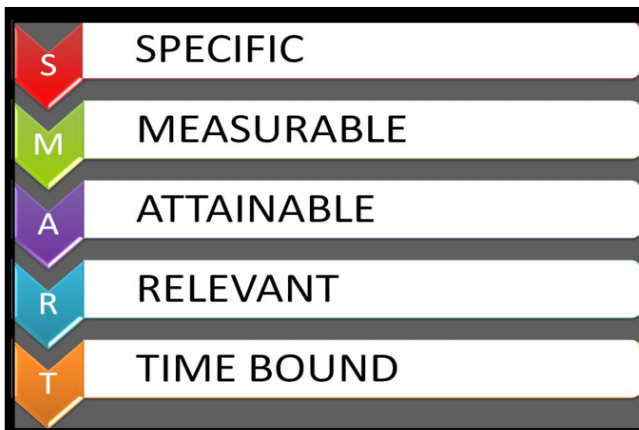
## Manage around these Weaknesses

Is the weakness a lack of talent?

Is the weakness in a critical duty?

What strengths can the employee draw upon to improve?

## SMART Goals



### Write SMART Goals – Case Study

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## Observation & Feedback

Deliberate

Data Collection

Documentation

## Strength Based Observations



Awareness of Your Assumptions



Look for Strengths



Bring Objectivity and Facts

## Break Down the Silos



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## Feedback and Motivation

Best strategies for feedback:

Best strategies for motivation:

## Example of Employee Evaluation Narrative

### Janice Smith – Finance Administrator

#### Current Year Information:

**2018 Performance:** Your primary duties include preparing weekly and monthly financial reports, conducting quarterly audits, and examining and rectifying daily revenue and expenditure reports.

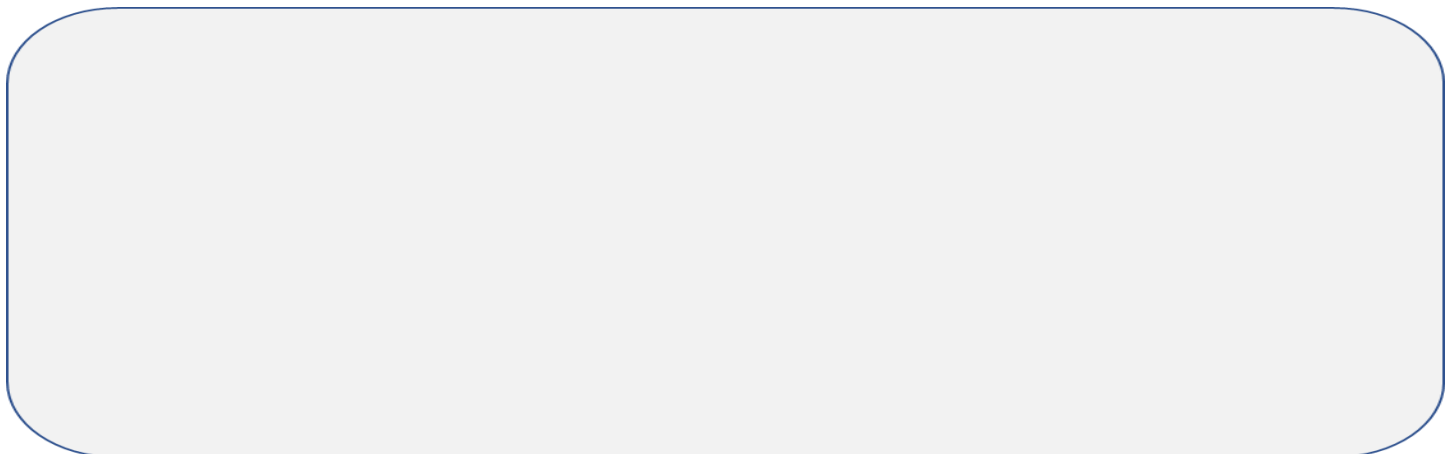
You frequently exceed the performance standard for the position. You consistently and accurately completed most tasks before their deadlines and proactively provided new orientation training to four new employees. You foster a positive work environment and always find time to assist your colleagues or direct them to an individual who can provide them with the information they need. During this rating period, you completed two hundred twenty-four (224) expense reports. Each report was submitted either before or by its deadline. Nine of your reports this year needed minor revisions. Your quarterly audits were completed on time and none required corrections. Additionally, your weekly and monthly reports were professionally prepared. None of your reports required revisions and you submitted a late report on three occasions.

#### Performance expectations for the next rating period:

You will be expected to continue preparing weekly and monthly financial reports, conduct quarterly audits and examine and rectify all daily revenue and expenditure reports. Since one of your strengths is motivation and your ability to provide essential training to your colleagues, I would like you to expand your role as a department training facilitator. I am challenging you to research, design and update our current training initiatives for continuous improvement in the areas of weekly and monthly financial reporting, Federal and State auditing procedures and strategies on efficient ways to rectify revenue and expenditure reports. Your goal during the coming rating period will be to provide one six (6) hour long training on a quarterly basis in one of the topic areas described above.

**What rating would you assign to Janice for her current year's performance?**

## Performance Management Checklist for Supervisor



## 7 Questions Employees Want to Know

How am I doing?

What can I do to be more effective?

What are your expectations of me during the next review?

How will my work be evaluated during that time?

How do my goals fit into the organization?

Is there any performance issues I should be cautious about?

What kind of help or attention can I expect from my supervisor?

## The Evaluation Meeting

*Notes:*

## Questions for Labor Relations