



**WPI**

# **Staff Performance Management and Review Process – *Overview for Managers***



# Performance Review vs. *Performance Management*

## Performance Review

Formal documentation – a **snapshot** – of the past period of the performance management cycle

## Performance Management

Day-to-day, ongoing **process** that allows the manager and the employee the opportunity to communicate regularly about performance-related successes and challenges



# The Importance of Performance Reviews

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## Benefits for Managers

- Help managers foster open communication with employees
- Good to set objectives for the future
- Improve team outcomes
- Kick-starts projects that may have fallen by the wayside

## Benefits for Employees

- Identify future career opportunities
- Gain recognition and reward for their performance
- Help them to identify areas for improvement
- Provides a platform to address issues and grievances

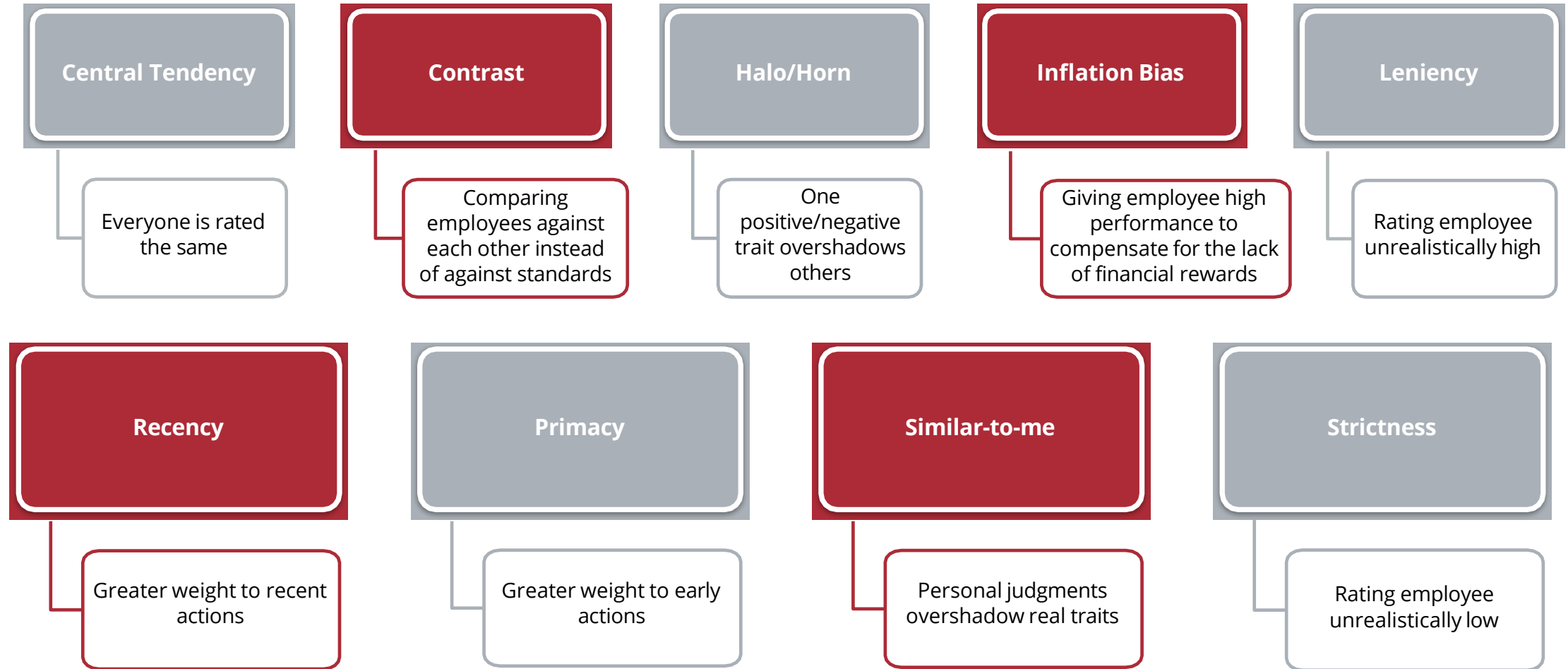
# Accurate and Consistent Performance Management

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## Why should managers care? Ensuring accuracy and consistency...

- **Builds Trust and Engagement**
  - Ensures employees feel valued and respected.
  - Fosters higher levels of engagement and motivation.
  - Reduces feelings of bias or favoritism.
- **Drives Continuous Improvement**
  - Provides clear and honest feedback for growth.
  - Encourages a culture of accountability and excellence.
  - Addresses performance issues promptly to prevent complacency.
- **Promotes Fairness and Equity**
  - Ensures all employees are held to the same standards.
  - Prevents perceptions of discrimination or unfair treatment.
  - Enhances morale and a sense of belonging.
- **Supports Employee Development**
  - Identifies specific areas for growth and development.
  - Helps tailor development plans to individual needs.
  - Guides employees in acquiring new skills and competencies.
- **Improves Retention and Reduces Turnover**
  - Increases job satisfaction.
  - Reduces the costs and disruptions associated with high turnover.
  - Helps retain top talent and maintain organizational stability.
- **Enhances Organizational Success**
  - Aligns employee performance with organizational goals.
  - Drives overall productivity and growth.
  - Creates a culture of continuous improvement and high performance.

# Avoid Common Evaluation Biases



# Providing Constructive Feedback: SBI Model

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**Situation-Behavior-Impact (SBI) is a structured model used to provide clear, specific, and actionable feedback.**

## Components

### Situation

- Describe the specific situation where the behavior occurred

### Behavior

- Describe the observable behavior that you want to address

### Impact

- Describe the impact of the behavior on others, the department, the division, or the university



# Constructive Feedback: SBI Model

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**Situation-Behavior-Impact (SBI) is a structured model used to provide clear, specific, and actionable feedback.**

## Positive Feedback Example

- **Situation:** "During the last quarter's team project on improving student enrollment..."
- **Behavior:** "...you consistently provided innovative ideas and took the initiative to lead the weekly status meetings..."
- **Impact:** "...which significantly contributed to the project's success, increased team collaboration, and resulted in a 10% rise in enrollment rates."

## Constructive Feedback Example

- **Situation:** "Over the past six months, during our monthly department meetings..."
- **Behavior:** "...you have frequently arrived late and seemed unprepared for your updates..."
- **Impact:** "...which has disrupted the meeting flow, delayed decision-making, and caused frustration among team members who rely on your input."

# Feedback Based on Performance level

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## **The Outstanding Performer**

**Performance levels and accomplishments far exceed expectations**

- Suggest new responsibilities within their present position
- Try to keep the employee focused, interested, and engaged
- End on a positive note

## **The Successful Performer**

**Consistently demonstrates effective behaviors and qualified experienced for the position**

- Highlight that a successful performer is the expected level of performance
- There is nothing wrong with scoring as 'successful' in the process
- Discuss a plan of action to take more ownership, exceed goals, and initiate processes
- End on a positive note

## **The Highly Successful Performer**

**Consistently and often exceeds expected performance levels**

- Encourage them to grow and develop; be specific
- Suggest new responsibilities within their present positions
- Help them to identify strategies that will contribute to sustained performance
- Discuss a plan of action: goals, next steps, etc.
- End on a positive note

# Feedback Based on Performance level

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## **The Inconsistent Performer**

**Demonstrates expected performance inconsistently and achieves some but not all goals**

- Explain your concern
- Encourage them to grow and develop; be specific
- Help them to identify strategies that will contribute to improved, consistent performance
- Work on developing a performance plan
- Discuss timeframe for meeting performance plan goals
- Discuss a plan of action: goals, next steps, etc.
- End on a positive note

## **The Unsatisfactory Performer**

**Rarely achieves the expected performance level**

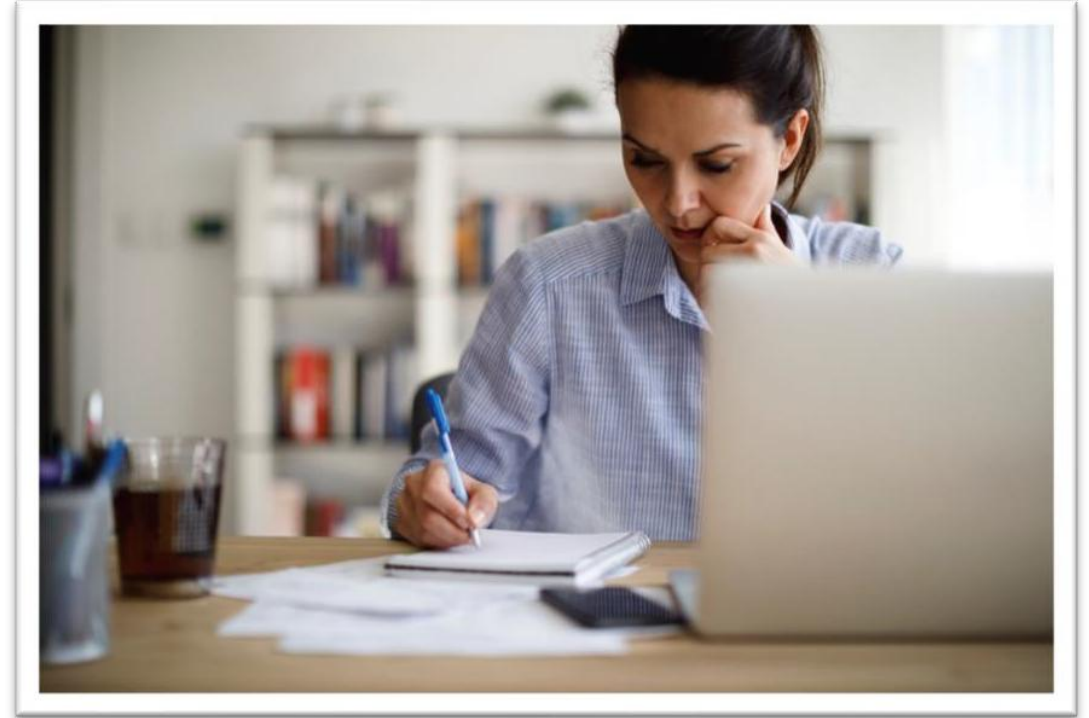
- Explain your concern
- Inform the employee about goals and expectations
- Work on developing a performance plan
- Get the whole story
- Work with the employee in determining the behaviors or performance that are needed
- Discuss timeframe for meeting performance plan goals
- End on a positive note

# Preparing for the Review

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## Before starting the review...

- Make time for the process
- Request a self-evaluation from each direct report
- Request feedback from others (where appropriate)
- Compile important documents (e.g., job descriptions) and get a list of accomplishments and projects
- Assign appropriate ratings
- Craft high-quality, specific, and actionable feedback



# The Review Meeting

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## Framework for Review discussion

- Discuss meeting purpose and structure
- Create a positive environment
- Review last year's goals
- Clarify any immediate items and settle any concerns
- Determine and discuss future goals
- Schedule the follow-up meeting
- Close discussion

# The Review Meeting

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## During the discussion

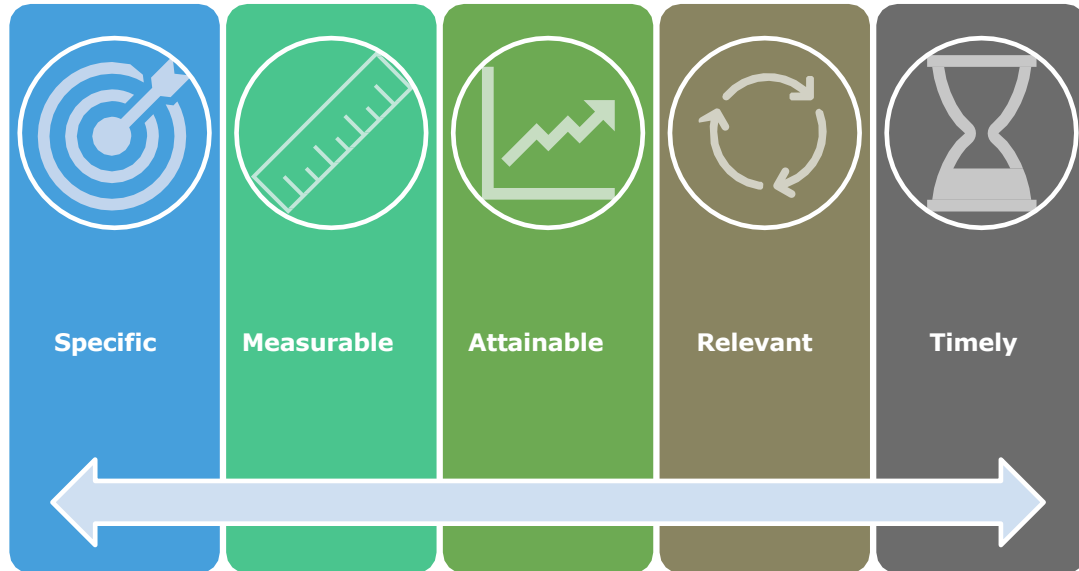
Explain the meeting purpose and structure

Make sure you are:

- Clear
- Concise
- Objective
- Following a logical order
- Providing examples of specific behaviors and situations
- Accounting for remote work challenges

# SMART Goals

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## Make sure to set goals that are...

**Specific** – Clearly defined goals specific to the role of the employee

**Measurable** – Establishes a concrete criteria for measuring progress toward goal completion

**Attainable** – Set goals that are realistic and achievable by the employee

**Relevant** – The goal must be worthwhile and related to the employee's skill

**Time-based** – A goal should be grounded, with a definite end date within which it must be achieved

# SMART Goals – Examples

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Complete LinkedIn Learning courses during the next term to improve 1) verbal and 2) written communication



Improve presentation skills to reduce filler words by 50% thru completing two training sessions and delivering at least three presentations with feedback by the end of next term.



Improve written and verbal communication skills



Improve presentation skills

# SMART Goals - Questions

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## Let's answer some questions...

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**S**pecific – Who is involved? What do they accomplish? What is the purpose of doing this? What are the requirements and the constraints?

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**M**easurable – How much? How many? How will they know when it is accomplished?

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**A**ttainable – Does the goal inspire them? Does the goal challenge them? How much do they need to learn? How much time are they going to dedicate to the goal? Who can help them?

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**R**elevant – Look at their situation. How relevant is the goal? Is it part of a life or career path? How will it help them as they pursue next steps?**T**imely – When does the goal need to be accomplished?

# Follow-Up After the Review

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## What comes next...

**Action Plans:** Develop and monitor action plans to address areas of improvement and support development goals

**Regular Check-Ins:** Schedule meetings to review progress and provide ongoing support.

**Continuous Support:** Ensure continuous support and resources are available to employees to help them achieve their goals.

**Documentation and Record Keeping:** Consider a way to track progress of goals to ensure an accurate, fair, and consistent approach to performance reviews.



# Key Points to Remember

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- Performance reviews are a snapshot in time, whereas performance management is an ongoing process
- Performance reviews can be challenging, but there are steps managers and employees can take to prepare for the process
- While delivering feedback, managers should strive to be constructive in their message
- Managers can experience common rating biases; being aware of them is the first step to ensure they a) do not contaminate the performance ratings and b) remain as accurate as possible in their ratings
- There are many benefits to goal setting (e.g., making employees aware of strengths and weaknesses)
- Try to write goals that are SMART (Specific, Measurable, Achievable, Relevant, Time-based)
- T&I is here to help!
  - [Talent Strategy Partners](#)
  - Resources ([LinkedIn Learning](#))