

Performance Discussion + Position Review

Best practices for performance discussion revolve around equity, consistency, and employee input. To achieve this, many schools and companies have paired their performance discussion with an employee self-assessment with questions that allow for feedback on leadership beforehand to have thoughts on paper before conducting the appraisal and see if the mindsets are aligned.

The performance appraisal should consist of 1) review of standard performance factors, 2) an employee self-assessment 3) supervisor review of the self-assessment with written comments, 4) the performance appraisal and optional 5) development/performance improvement plan.

1. Standard Performance Factors: This worksheet is an optional, preparatory tool to be used by supervisors and employees to help prepare for the annual Performance Review. Please review the worksheet in advance and, together, select factors that are key performance indicators. The supervisor and employee should take time to make notes on selected factors prior to the discussion to help answer the questions on the Performance Discussion form and foster open dialogue. This worksheet is for notes only and does not need to be submitted to HR as part of this process.

2. Employee Self-Assessment (to be completed and shared with supervisor one week in advance of performance appraisal): The 4-part self-assessment allows the employee to be prepared with thoughts on progress and any need for improvement. These notes, shared in advance with the supervisor allow the appraisal to flow as a discussion on performance that is buildable, gives autonomy, and provides the employee and supervisor the opportunity to share space and ideas in an intentional dialogue.

Section 1: Role Review

- What are the most important things that you do?
- Are there any responsibilities that you have questions or concerns about?
- Have there been aspects in your work or home life that have helped or hindered your performance this year? (e.g.: office restructuring, affinity group, training, loss, incident, etc.)
- Are there any responsibilities that you seek to amplify your role?
- Any aspirations you'd like to share about what this role could be?

Section 2: Appreciation

In determining areas of strength – consider the following questions:

- What accomplishments are you most proud?
- What did you enjoy most about your job in the past year?
- What areas of exceptional performance should be noted?
- What aspects of your work contribute to your overall effectiveness?

Section 3a: Development/Individual Goals (pull from standard performance factors for topics)

In determining areas for individual growth potential – consider the following questions:

- What could you do to improve your overall effectiveness?
- What did you find most disappointing about your work in the past year?
- What did you find most difficult or challenging in your job in the past year?
- What obstacles prevent you from performing at an exceptional level in your job?

Section 3b: Development/Individual Goals (pull from standard performance factors for topics)

As you consider your role and contributions at Dominican, consider the following questions:

- ♦ How are you contributing to the university mission and its commitment to justice, equity, and inclusion?
- ♦ What are your goals for the coming year? How could your supervisor support you in achieving these goals?
- ♦ What skill building or development opportunities would be helpful to you as continue to perform exceptionally in your role and/or consider opportunities for promotion or transfer?

Section 4: Expectations/Institutional Goals

- ♦ How are you going to help meet a critical goal for the department?
- ♦ How will you help the university achieve one of its broader goals?

Section 5: Additional notes

- ♦ Please add any comments you want to make your supervisor aware as they relate to your job, your performance or your participation in the life of the university community.
- ♦ Identify any outlying areas of concerns not addressed in other sections.
- ♦ Share any acknowledgement/praise you have received that you want to formally note to your supervisor as part of your appraisal.

3. Supervisor Review of Assessment with additional written comments: *Supervisors should review the employee's self-assessment and provide written comments in response.*

Section 1: Role Review

Assess the existing job description and the employee comments to determine any updates that are needed for the job description. In addition, consider the following questions:

- ♦ Are there any responsibilities that are no longer applicable?
- ♦ Are there any responsibilities that should be amplified?
- ♦ Are there tasks that have emerged as new responsibilities that should be added?
- ♦ Are there tasks that should be added to allow the employee to achieve professional growth?

Section 2: Appreciation

Identify and acknowledge areas of strength, significant contributions made by the employee. In determining areas of strength – consider the following questions:

- ♦ What accomplishments were achieved?
- ♦ How did the employee grow and demonstrate innovation or suggest new ideas?
- ♦ What areas of exceptional performance should be noted as exceeding expectations?

Section 3a/b: Development/Individual Goals

Pull from standard performance factors for topics) Identify areas where the employee could grow and/or improve their performance. These should be items that have been addressed or acknowledge throughout the year. Consider the following questions :

- ♦ Is the employee's assessment of areas that need more attention consistent with your assessment? If not, how do your perspectives differ? Did they meet your expectations but not their own? Are there other areas they did not identify?
- ♦ How can you help them improve their overall effectiveness? What resources or training can be provided as needed?
- ♦ How can you help address what they identified as most disappointing about their work? How can you help them manage difficult or challenging aspects of their job more effectively to limit frustration?
- ♦ How can you help eliminate obstacles that they have identified as preventing them from performing at an exceptional level?

- ♦ How can you help them meet their professional goals?
- ♦ How might you help mentor or prepare them for advancement within the university either through promotion within the unit or by transferring to another department?
- ♦ How do you affirm their demonstrated commitment to the university mission and its commitment to JEI?

Section 4: Expectations/Institutional Goals

Review the aspects of the strategic plan that relate to the departmental work and identify ways they can support these initiatives.

Section 5: Additional Notes

Review the aspects of the strategic plan that relate to the departmental work and identify ways they can support these initiatives.

- ♦ Please add any comments you want to make your supervisor aware as they relate to your job, your performance or your participation in the life of the university community.
- ♦ Identify any outlying areas of concerns not addressed in other sections.
- ♦ Share any acknowledgement/praise you have received that you want to formally note to your supervisor as part of your appraisal.

Section 6: Improvement Plan (Optional/As Needed)

Together, we have discussed the following issue(s) that must be addressed in the next ___months. We have identified a plan for improvement and are committed to having a follow up conversation to gauge progress in the specified areas. Plan for improvement includes:

1. Define and discuss area in need of improvement
2. Create goals related to areas of improvement
3. Discuss three ways on how to accomplish said goals
4. Provide resources to assist in goal achievement
5. Define expectation for improvement
6. Follow up on progress by setting check-in dates (30 days, 60 days, 90 days)
7. Once goal is achieved, update plan as 'improved'

4. Position Description: *The Office of Human Resources has compiled a list of all position descriptions we currently have on file to 1) begin the process of updating them where needed, 2) format the descriptions cohesively with others on campus, and 3) review the descriptions and titles for consistency and formatting.*

*After supervisors have reviewed and evaluated the role with the current employee, update the position description using the current template (included in booklet), as well as, the information gained from the position appraisal. The goal is to have accurate and concise position descriptions on file for all staff by **August 1st, 2024.***

Standard Performance Factors

This worksheet is a preparatory tool to be used by supervisors and employees to help prepare for the annual Performance Discussion. Please review the worksheet in advance and, together, select factors that are key performance indicators. The supervisor and employee should take time to make notes on selected factors prior to the discussion to help answer the questions on the Performance Discussion form and foster open dialogue. This worksheet is for notes only and does not need to be submitted to HR as part of this process.

<i>Standards</i>	<i>Descriptions</i>	✓
Mission	<i>Values, supports, and models mission to prepare students to pursue truth, to give compassionate service, and to participate in the creation of a more just and humane world.</i>	
Equity and Inclusion	<i>Respects and values individual differences. Contributes to the building of inclusive community. Aims to better understand the perspectives of others,</i>	
Respect and Dignity	<i>Helps to create a work environment where everyone is valued and is treated fairly and consistently; seeks to minimize conflict and create a positive work environment.</i>	
Teamwork and Collaboration	<i>Builds and maintains constructive working relationships at all levels; cooperates with others toward achievement of common goals; seeks consensus and win-win solutions to problems/conflicts; actively contributes and fully participates in team initiatives; focuses on greater good rather than individual interests.</i>	
Initiative	<i>Seeks and acts on opportunities to improve operations, methods and procedures within appropriate guidelines; completes tasks with minimal supervision. Displays resourcefulness and self-reliance.</i>	
Adaptability and Responsiveness to Change	<i>Demonstrates the ability to adjust to changing job or organizational requirements and is at ease with learning and/or accepting new responsibilities or tasks. Has the ability to successfully alter activities to cope with demands of new situations. Shows an openness to different and new ways of doing things.</i>	
Dependability	<i>Reliable in assuming and carrying out assignments; willing to be held accountable. Demonstrates commitment in support of departmental goals and objectives.</i>	
Technical Competence	<i>Demonstrates knowledge of computers, software & equipment to meet the requirements of the job and increase job performance. Uses technology to create efficiencies.</i>	

Quality/Accuracy of Work	<i>Produces work that is comprehensive in scope, complete in detail, and accurate in content.</i>	
Field or Departmental Knowledge	<i>Demonstrates knowledge of his/her functional area including policies, procedures and regulations that guide the department or unit; keeps current in the field.</i>	
Attendance / Punctuality	<i>Consistently reports to work on time with minimal unplanned absences; manages breaks, lunch hour and early departures appropriately.</i>	
Time Management	<i>Sets priorities, goals, and timetables to achieve maximum productivity. Manages priorities effectively based on needs of the department/unit. Delivers results by stated deadlines.</i>	
Communication	<i>Exhibits good listening and comprehension skills; effectively expresses his/herself in written and oral communication; keeps others adequately informed; responds to others with tact, diplomacy and composure.</i>	
Leadership	<i>Motivates and encourages employees to achieve success. Inspires confidence in people.. Fosters open communication. Establishes and clearly communicates priorities. Guides others through change effectively.</i>	
Problem Solving	<i>Assesses and defines situations. Establishes solutions and decides on effective action while demonstrating an understanding of consequences and impact. Demonstrates creative thinking.</i>	
other job specific factors (ex: people or financial management)		