

Completing Manager Evaluations

MEANINGFUL CONVERSATION

Completing Manager Evaluations

- ▶ As a result of this training, participants will be able to:
 - ▶ Appreciate the importance of giving feedback and know how it should be delivered;
 - ▶ Understand the steps of the annual review process;
 - ▶ Complete manager evaluations using the performance review form;
 - ▶ Realize the due dates for each part of the process, and
 - ▶ Know where to find more information about the process

Feedback

Feedback to an employee is essential to help clarify your expectations, build their confidence and encourage them to learn from your experiences.

- ▶ **Constructive** – balanced information that will help resolve an issue or focus an individual to the future
- ▶ **Timely** – provided within a reasonable timeframe and periodically
- ▶ **Specific** – based on observed performance compared to the standard or objective
- ▶ **Impactful** – linked to the importance of the College's vision, mission and/or business plan
- ▶ **Caring** – shared in a way that demonstrates care and concern for you
- ▶ **Reciprocal** – presented as an open dialogue that encourages an exchange of ideas and perspectives

It's an Annual Review Process!

- ▶ Be honest and don't sugar-coat feedback about an employee's performance
- ▶ Your ratings and commentary should reflect an employee's performance for the entire review period
 - ▶ If an employee initially struggled and then improved performance, praise for the improvements but acknowledge the slower start in the rating as well as the commentary.
- ▶ An employee should not be surprised by your feedback at the end of the review period



The Review Form

- ▶ Consists of four sections you need to expand and complete:
 - ▶ Goals
 - ▶ Competencies
 - ▶ Developmental Comments
 - ▶ Overall Comments
- ▶ **Goals** – created by your supervisor or you and is work that is in addition to regularly assigned duties
- ▶ **Competencies** – vary by the role you have on campus

	Competency 1	Competency 2	Competency 3
Employee	Continuous Learning	Service Focus	Performance of Regularly Assigned Duties
Supervisor	Teamwork/ Collaboration	Functional Expertise & Technical Proficiency	Performance of Regularly Assigned Duties
Senior Officer	Leadership	Results/ Achievement Orientation	Performance of Regularly Assigned Duties

Goals and Review Templates

- ▶ Goal achievement is important for College's viability and employee success
- ▶ Based on the date range of the goals, your review form will contain goals for the current review period.
- ▶ Goals cannot be edited once review forms are distributed

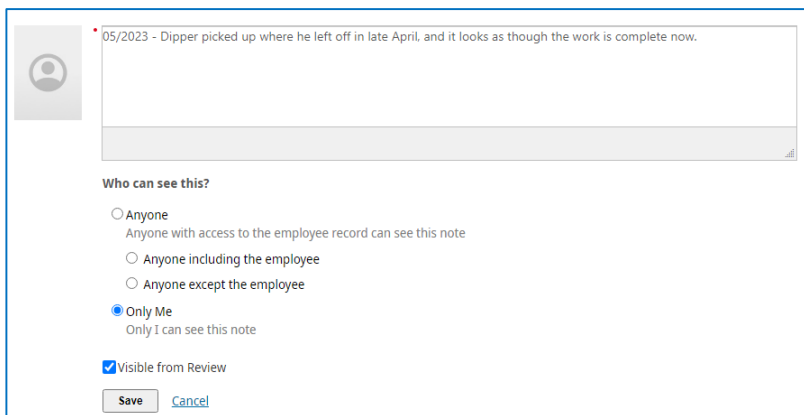
Goal Progress Throughout the Review Period

- ▶ Goals should be worked on throughout the review period and progress can be noted in the Employee Portal by either the employee or supervisor
 - ▶ My Team > My Employees > Select an Employee > Career & Education > Goals
- ▶ Select a goal that you want to add notes to, and click on progress hyperlink

The screenshot displays the 'Add/Change Goals' interface in the Hood College Employee Portal. The left sidebar lists various categories such as Personal, Jobs, Career & Education, and Goals. The main content area is titled 'Add/Change Goals' and includes a 'Goal Details' section. The title is 'File Management', the description is 'Alphabetize the files in the file room.', and the category is 'Performance'. A progress indicator shows '0% complete'.

Goal Progress Throughout the Review Period

- ▶ Once the Goal Notes screen opens, add your notes and make choices for the Who can see this? and Visible from Review prompts
- ▶ Click Post to save your note. The history of note-taking is saved at the bottom of this screen.

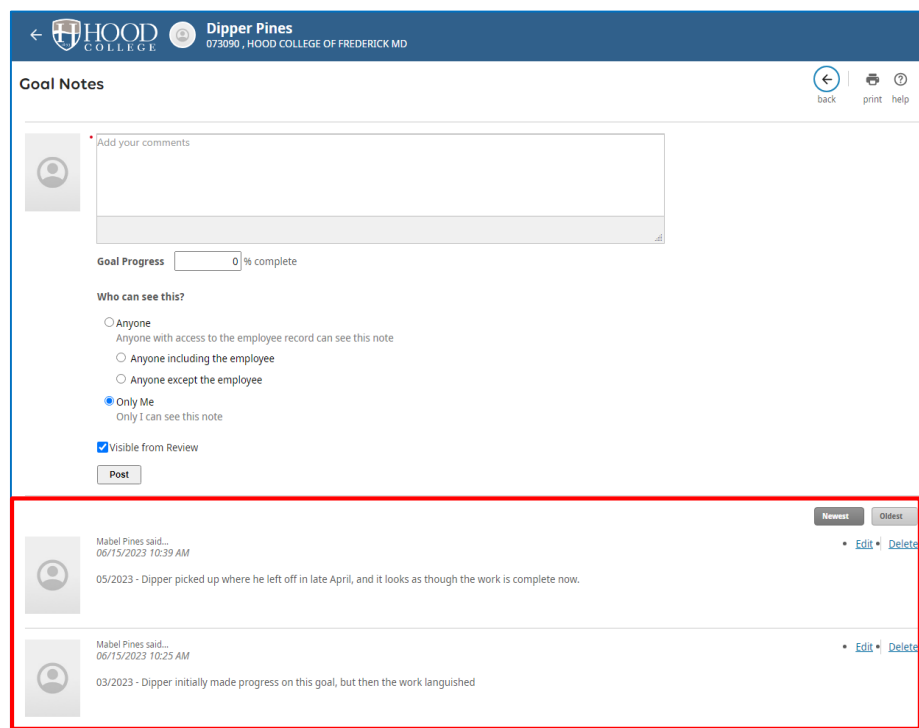


05/2023 - Dipper picked up where he left off in late April, and it looks as though the work is complete now.

Who can see this?

- Anyone
Anyone with access to the employee record can see this note
- Anyone including the employee
- Anyone except the employee
- Only Me
Only I can see this note

Visible from Review



HOOD COLLEGE | Dipper Pines | 073090, HOOD COLLEGE OF FREDERICK MD

Goal Notes

back print help

Add your comments

Goal Progress % complete

Who can see this?

- Anyone
Anyone with access to the employee record can see this note
- Anyone including the employee
- Anyone except the employee
- Only Me
Only I can see this note

Visible from Review

05/2023 - Dipper picked up where he left off in late April, and it looks as though the work is complete now.

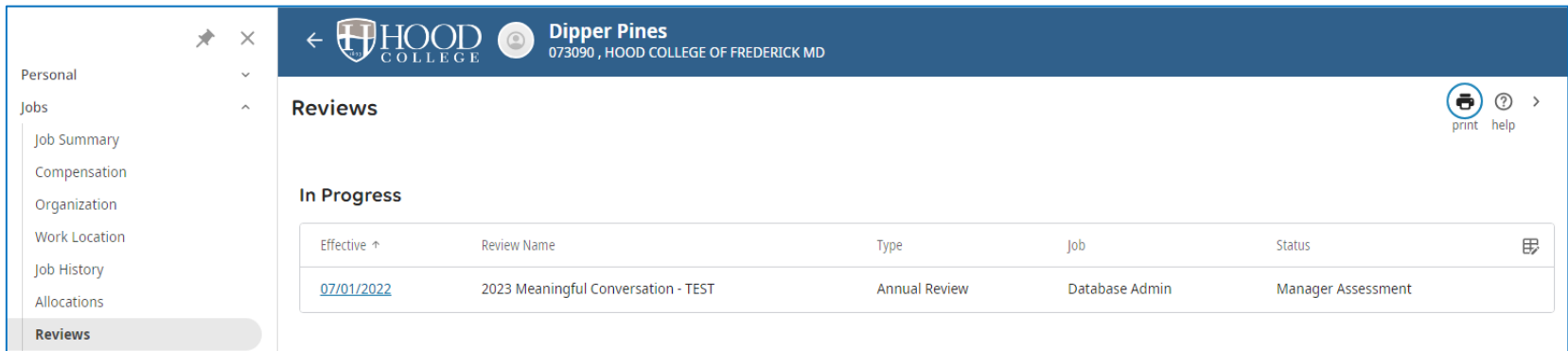
Mabel Pines said... 06/15/2023 10:39 AM

03/2023 - Dipper initially made progress on this goal, but then the work languished

Mabel Pines said... 06/15/2023 10:25 AM

Completing Manager Evaluation

- ▶ Locate an employee's review form
 - ▶ My Team > My Employees > Select an Employee > Jobs > Reviews
 - ▶ Click on the In Progress Review to get started



The screenshot displays the 'Reviews' section of the HR system. The header includes the Hood College logo, the user name 'Dipper Pines', and the location '073090, HOOD COLLEGE OF FREDERICK MD'. A left sidebar contains navigation options: Personal, Jobs, Job Summary, Compensation, Organization, Work Location, Job History, Allocations, and Reviews (highlighted). The main content area shows a table of reviews under the 'In Progress' heading. The table has columns for Effective date, Review Name, Type, Job, and Status. A single review is listed with an effective date of 07/01/2022, a review name of '2023 Meaningful Conversation - TEST', a type of 'Annual Review', a job of 'Database Admin', and a status of 'Manager Assessment'. There are also 'print' and 'help' icons in the top right corner of the main content area.

Effective	Review Name	Type	Job	Status
07/01/2022	2023 Meaningful Conversation - TEST	Annual Review	Database Admin	Manager Assessment

Completing Goals Sections

- ▶ Click Start to open each section of the form.
- ▶ Select the number of stars to rate the employee against completing the first goal. Add commentary to support your rating. Proceed to the next goal.
- ▶ **Save your progress regularly!**

Four Point Goal Assess... ✕

- 1 - Not Achieved**
Individual did not achieve the goal requirements.
- 2 - Some Progress Made**
Although the goal is not completely achieved, some real progress has been made and needs to be acknowledged.
- 3 - Achieved Goal Requirements**
Individual achieved the goal requirements
- 4 - Exceeded Goal**
Individual performed at a level that surpassed the goal requirements.

2023 Meaningful Conversation - TEST

Dipper Pines - Goals

Provide details on progress and achievement of each goal for the review period.
Rating Scale [Four Point Goal Assessment Scale](#)

[Employee Goals](#)

1. **File Management**
0% complete
Alphabetize the files in the file room.
[Show details...](#)
[Notes](#)

No comments are available.

Dipper Pines, Employee
No Rating Submitted

Mabel Pines, Manager
☺☆☆☆☆

Add your comments

Section Weight: 50%
Goal Weight: 25%

save reset cancel save & close print help

Completing Competencies Sections

- ▶ Click Start to open each section of the form.
- ▶ Select the number of stars to rate the employee against completing the first competency. Add commentary to support your rating. Proceed to the next goal.
- ▶ **Save your progress regularly!**

Four Point Competency ...

- 1 - Not Proficient**
Did not meet competency; needs further development
- 2 - Proficient**
Meets competency requirements
- 3 - Exceeds Requirements**
Performance consistently exceeds the standards
- 4 - Expert**
Demonstrates full mastery of the competency and may be a resource for other colleagues

2023 Meaningful Conversation - TEST

Dipper Pines - Competencies

Competencies are a set of demonstrable skills which lead to effective performance in an individual's role. Rate the assigned competencies and provide details on how you focused on and performed the competencies throughout the review period.
Rating Scale [Four Point Competency Scale](#)

Section Weight
50%

1. **2021 - ZE1 Continuous learning/Process Improvement** Competency Weight: 33%

Actively and continuously gaining insight of strengths and relevant areas that need further development (with regard to skills and knowledge) and acting upon it; taking responsibility for behavior, mistakes, and results, learning from successes and failures, and teaching others to do the same; using research and models to inform practices; sharing key insights with others; searching for ways to improve processes and results.

[Show details...](#)

[Notes](#)

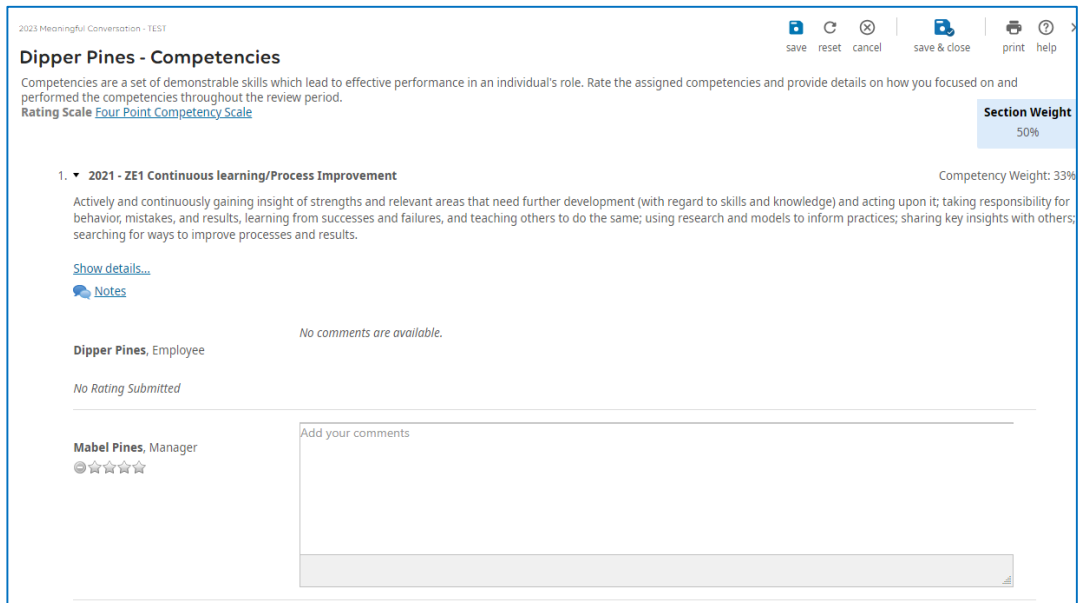
No comments are available.

Dipper Pines, Employee

No Rating Submitted

Mabel Pines, Manager
☆☆☆☆

Add your comments



Completing Developmental Comments

- ▶ Click Start to open this section of the form
- ▶ Free-form text box available to document an employee's development needs, desired outcomes and ideas for action steps to accomplish development needs
- ▶ **Save your progress regularly!**

2025 Meaningful Conversation - TEST

save reset cancel save & close print help

Dipper Pines - Developmental Comments

Enter comments describing development plans, action steps to accomplish them, and desired outcomes. [View Personal Development](#)

Employee Comments

No comments are available.

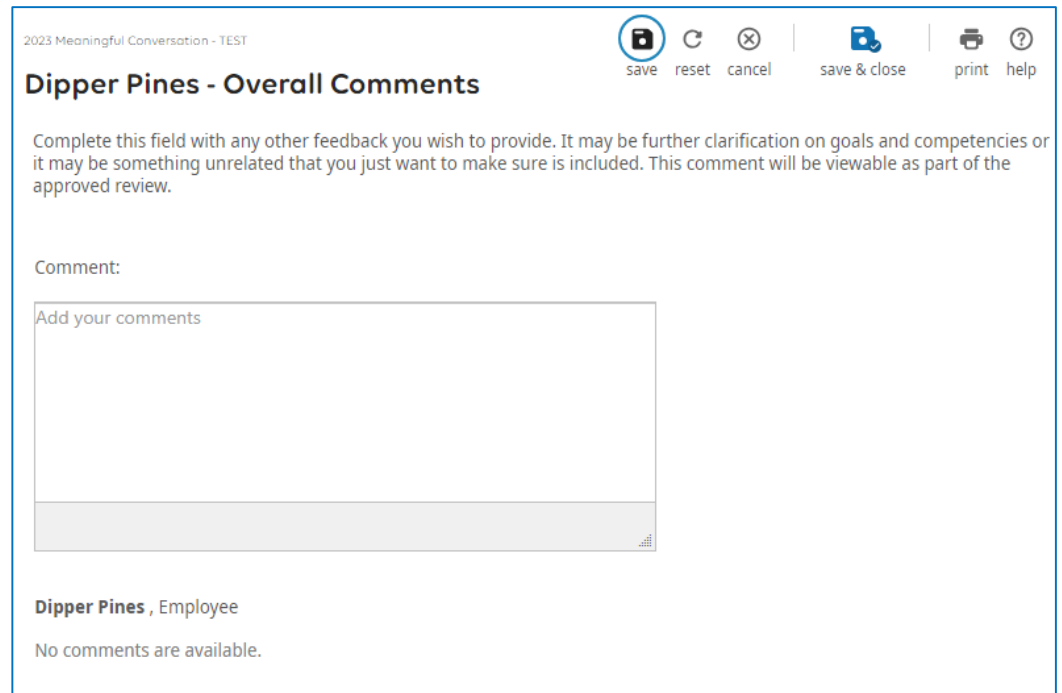
Manager Comments

Add your comments

The screenshot shows a web-based form titled "Dipper Pines - Developmental Comments". At the top, there is a navigation bar with icons for save, reset, cancel, save & close, print, and help. Below the navigation bar, the form title is displayed. A brief instruction asks the user to enter comments describing development plans, action steps, and desired outcomes, with a link to "View Personal Development". The form is divided into two sections: "Employee Comments" and "Manager Comments". The "Employee Comments" section currently shows "No comments are available." The "Manager Comments" section features a large text input area with the placeholder text "Add your comments".

Completing Overall Comments

- ▶ Click Start to open this section of the form
- ▶ Free-form text box available to document overall comments about an employee's job performance
- ▶ **Save your progress regularly!**



2023 Meaningful Conversation - TEST

Dipper Pines - Overall Comments

Complete this field with any other feedback you wish to provide. It may be further clarification on goals and competencies or it may be something unrelated that you just want to make sure is included. This comment will be viewable as part of the approved review.

Comment:

Add your comments

Dipper Pines , Employee

No comments are available.

save reset cancel save & close print help

Sending Review to Your Next-Level Manager

- ▶ Send the review form to your manager once you have completed all sections of an employee's review and you are satisfied with your ratings and commentary

Review Summary

Dipper Pines, Database Admin [Employee Notes](#)
Effective Date 07/01/2022

Complete the annual review within the appropriate time frames. Guidance on how to complete your review is available on the Human Resources website at Learning & Development > Meaningful Conversation.

Contributors

Dipper Pines → Mabel Pines → Amanda Harris
Due Date 06/30/2023 Due Date 07/28/2023 Due Date 08/11/2023

Review sections

	Employee Rating	Manager Rating	
Goals	—	—	Start
Competencies	—	—	Start
Developmental Comments	N/A	N/A	Start
Overall Comments	N/A	N/A	Start
Final Score		—	

Send

Send to the next contributor:

- Send **forward** to Amanda Harris
- Send **back** to Dipper Pines for changes

Routing Comments

These comments will not appear on the final review and are visible to all review contributors.

[Send](#)

Due Dates & Responsibilities

Due Date	Process Steps	Who's Responsible
June 30	Employee completes Self Evaluation and sends to their Manager (Mgr 1)	Employee
July 28	Mgr 1 completes evaluation and submits to Next-Level Manager (Mgr 2) for review and additional comments. * Ratings and comments should not be discussed with employee during this time in order for Mgr 2 or President to provide input.*	Manager 1
July 28	Employee and Mgr 1 plan and discuss new goals for the 2023-24 review year	Employee & Manager 1
Aug 11	1. Mgr 2 reviews evaluation. Important Note: Mgr 2 may send form back to Mgr 1 to revise ratings and comments. If so, Mgr 1 re-submits updated review to Mgr 2. *Reviews held at Mgr 2 phase while President completes her review* 1. Mgr 2 reviews evaluation and provides comments (optional). 2. Form is sent back to Mgr 1 and Employee no later than August 16 th .	Manager 2
Aug 16	President reviews Meaningful Conversations and may request changes to Mgr 1 ratings and comments for some individuals.	President
Aug 17 - 31	Manager schedules and conducts 1:1 Meaningful Conversation discussion with Employee	Employee
Sept 1 - 6	Employee signs acknowledging review, and Mgr 1 submits review	Employee & Manager 1
Sept 8	HR closes 2022-23 Meaningful Conversation process	HR
Sept 15	Mgr 1 or Employee enter 2023-24 goals in the Employee Portal	Manager 1 or Employee

Questions and Who to Contact

- ▶ Email, call or IM Christine Traini with questions about the review process
- ▶ Information is available on the HR website:
 - ▶ Learning & Development > Meaningful Conversations

