

Performance Reviews

FS Training

For Review Period: 2022

Practice



Theory



THE UNIVERSITY OF
TENNESSEE
KNOXVILLE

FACILITIES SERVICES

Who's Who



Employee



Supervisor
(You)



2-Up

The Order of Signatures

- 1** ▶ The Supervisor creates the review
- 2** ▶ The 2-Up approves the draft
- 3** ▶ The Employee signs the review
- 4** ▶ The 2-Up signs and sends it to HR

1

2

3

4

The Supervisor creates the review

▶ Log in to the OPR system *opr.utk.edu*

▶ Select the review type (if needed), and an Action for the employee (either by starting a new review, or continuing a previous one)

▶ Select ratings and enter comments and goals

Select A Review Type:

2022 Annual Performance Review (January - December) ▼

Name	NetID	Review Status	Relationship	Total Score	
John Smith	jsmit214	Not Started	Direct Report	0	Actions ▼
Kate Phillips	kphil15	Supervisor Drafting Review	Direct Report		Actions ▼
Mark Cooper	mcoope57	Supervisor Drafting Review	Direct Report	15	Actions ▼

Actions for jsmit214's Review

Start New

Start From Previous

mm/dd/yyyy

Set Defer Date

View Direct Reports

Close

The 2-Up approves the draft

- ▶ The Supervisor sends the draft to 2-Up through the OPR system
- ▶ The 2-Up may request revisions and send the draft back for editing.
- ▶ The 2-Up reviews and approves the draft in OPR

The Employee signs the review

- ▶ The Supervisor sends the draft to the Employee (*before meeting*)
- ▶ The Supervisor and Employee meet to discuss the review, including goals and objectives
- ▶ Three options for the Employee:
 - Send the review back to Supervisor to continue editing
 - Add Comments/Goals, then sign and submit the responses
 - Digitally sign to complete the review

The 2-Up signs and sends it to HR

- ▶ The Supervisor sends to the "Final Approver" (2-Up)
- ▶ The 2-Up reviews and may either:
 - Send it back to the Supervisor for additional editing
 - Sign the review and release it to HR

Paradigm Shift

noun

- an important change that happens when the usual way of thinking about or doing something is replaced by a new and different way
- a fundamental change in approach or underlying assumptions

Consistency

The Scale

The Individual

Consistency

- ▶ Across and within units
- ▶ A more accurate and realistic picture of your team
- ▶ Challenges to creating consistency
 - Different evaluators and evaluatees
 - Unclear expectations

Inconsistent reviews lead to inconsistent work.

The Extremes




- 5 Exceeds expectations 100% of the time, in all circumstances
- 4 Exceeds expectations *more than* 50% of the time
- 3 Meets expectations - Demonstrates consistent, solid performance
- 2 Do not meet expectations *at least* 50% of the time
- 1 Rarely if ever (0% of the time) meets expectations

Putting it into practice

Inclusion, Diversity & Engagement - the extent to which the employee treats others with fairness, dignity, and respect, fosters inclusion, values individual and group differences, makes efforts to enhance inclusion, diversity, and engagement, and contributes to departmental and organizational unit diversity strategic goals.

- 5 - Consistently Exceeds Expectations (supporting statement/documentation required)
- 4 - Fully Achieves and Occasionally Exceeds Expectations
- 3 - Fully Achieves Expectations
- 2 - Sometimes Achieves Expectations
- 1 - Unsatisfactory/Rarely Achieves Expectations (supporting documentation required)

Meets Expectations




-  Helps those who require assistance without checking their age, race, color or position
-  Encourages the management to address acts of discrimination, bias and prejudice
-  Avoids making jokes that may be offensive to others and remains respectful to everyone

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Exceeds Expectations




-  Works hand in hand with co-workers to understand and appreciate different cultures and their way of doing things
-  Treats others with dignity thus preserving the university's culture of respect for all
-  Always discourages any form of harassment, bullying, and abrasive behavior

Putting it into practice

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Needs Improvement

-  Does little to discourages harassment, bullying, and abrasive behavior and lags behind in promoting team building activities.
-  Hardly bothers to assess whether the current procedures, practices, and policies are diverse.
-  Dedicates few resources for supporting diversity and hardly communicates the value of diversity

Focusing on the person

- ▶ The Individual (*not* The Group)
 - Each employee deserves an accurate, realistic rating based on their individual work
 - Are those that are Exceeding Expectations carrying the group?
- ▶ Employees deserve to know what they're doing well, and how to improve.
- ▶ Supervisors (YOU!) deserve to have an accurate, realistic picture of your workforce

Goal Setting

- ▶ Collaboration between you and the employee
- ▶ Goals should be enough to evaluate the employee



Goal Setting

Specific

Set real numbers with real deadlines.

Measurable

Make sure the goal is trackable.

Attainable

Work towards a goal that is challenging, but possible.

Relevant

Improve yourself, the team, or the university in some way that makes sense within your job function.

Time-Bound

Give yourself a deadline.