



**Performance Management Pilot
Supervisor Training**
Annual Performance Review

April 4, 2024

Illinois Human Resources



ANDREW HAGLER

HR Reporting & Data Manager
HRAIS

ANGELA REGGANS

Assistant Director
Labor and Employee
Relations

KATHY ADAMS

Training & Development Manager
ELOE

BECKY HINRICHS

Director
ELOE

Illinois Human Resources

In one word, what thought comes to mind regarding conducting an annual performance review?

A word cloud visualization of responses to the question. The most prominent word is 'ugh' in a large, dark green font. Other words include 'encouragement' (purple), 'excitement' (teal), 'feedback' (blue), 'needed' (purple), 'time-suck' (teal), 'because' (green), 'enjoyable' (orange), 'intimidating' (blue), 'timelines' (teal), 'conversation' (green), 'headache' (yellow-green), 'groan' (teal), 'time' (teal), 'opportunity-for-supporting-people' (yellow-green), and 'necessary' (blue).

Goals:



- Plan for the annual performance review process.
- Be able to explain changes to this year's performance review.
- Be conscious of how bias may impact the performance review.
- Conduct an effective performance conversation with your employees.
- Utilize the Cornerstone technology component of performance reviews.



Why?

Purpose



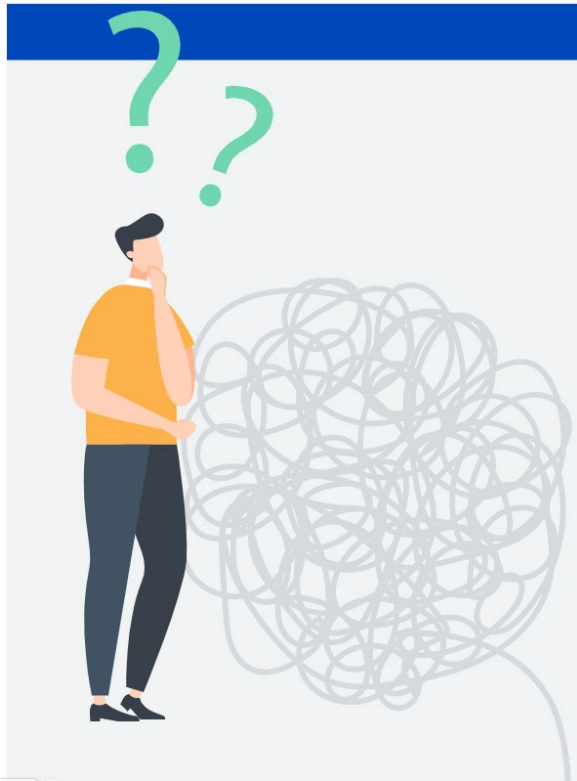
Pilot

Create a consistent performance management process utilizing an electronic system that includes goals & competencies.

Annual Review

Help staff learn, resulting in improved performance and personal development.

Why Cornerstone?



- Provide technology to facilitate the performance management process.
- Increase consistency of completion of annual performance review.
- Offer data retention and reporting capabilities.

Changes Implemented for Current Pilot



- Adjusted the performance appraisal period to June 1, 2023 through May 31, 2024.
- Reduced the number of competencies to three that tie to the UIUC's strategic plan to simplify the process.
- Developed coaching questions for annual review process.
- Eliminated the numerical rating system for subsections.
- Created an overall performance section for leaders to summarize performance.
- Reduced the overall rating scale to four rating options with definitions.

The background of the slide features three statues of figures in classical attire, rendered in a semi-transparent orange color. The statues are arranged in a row, with the central one being the most prominent. The overall background is a solid orange color.

Annual Review Process

Performance Management Overview



- Ongoing process involving feedback, coaching, and recognition.
- Effectively manage performance by acting with purpose to enhance competence, confidence, and capability.
- Three key phases throughout the year help maintain a focus on building talent and driving results through employee contributions.



Performance Evaluation Requirements



- A written understanding, between the supervisor and the employee, of the major duties and responsibilities of the job held i.e., a job description, and an agreement on priorities of the duties.
- A supervisor's written statement evaluating current performance compared to expected performance.
- A discussion between supervisor and employee of the evaluation including an understanding of plans and goals for the coming year.
- The employee's signature on the evaluation form to signify that the employee and the supervisor have discussed the contents of the review.
- A final written record by the supervisor of the review, together with any written employee comments, to be placed in the employee's personnel file.

[Provost Communication No. 22: Annual Review of Academic Professional Employees](#)

[Campus Administrative Manual: Performance Review for Civil Service Employees](#)

Steps for the Annual Performance Review



Step 1: Employee Self-Review

- Review Job Description.
- Update goals from year in review.
- Comments on competencies.
- Provide personal examples of accomplishments.

Step 2: Supervisor Feedback

- Supervisor will receive self-review.
- Gather feedback from multiple sources.
- Write comments including data and examples.
- Provide overall summary and overall rating.

Step 3: Performance Conversation

- Review job description.
- Discuss challenges and accomplishments.
- Focus on the conversation.
- Set future goals and development opportunities.

Step 4: Final Step

- Employee Acknowledgement
- Submit

Employee Self-Review



- Tell your employees what date their self-review is due.
- Verify in Cornerstone that the self-review is completed by that date.
- If not, touch base your employee to determine when they will complete it.
- If your employee does not complete the self-review by May 1 and you feel you must move forward, contact HRAIS.



What resources do you use to gather information as you prepare to complete an annual performance review?

- Progress on goals
- Job Description
- The previous year's evaluation
- Conversations we had throughout the year
- My supervisory notes
- Documentation / notes kept throughout the year
- Self-review, goals
- Interest in career development
- Attendance issues
- Kudos received
- Performance data
- Monthly check ins with employee
- Examples of excellent job performance
- Professional development opportunities
- Examples of areas of improvement

Preparation: Leverage Processes In Place



- Review the job description to determine if changes are needed.
- Gather up-to-date information about employee's performance.
- Review any notes on employee's completion of job duties/behaviors.
- Pull feedback from customers, other supervisors, or trusted colleagues.
- Rating scale with examples of behaviors or competencies.

Writing the Performance Review



Do:

- Be specific, provide examples
- Be factual and objective
- Clearly convey the intent of the message
- Focus on performance, not personality
- Think about areas for growth or challenges



Don't:

- Generalize
- Avoid performance concerns
- Use absolute words such as “always, never, completely, etc.”
- Commit in writing what you cannot deliver

New Competencies



COLLABORATION, COMMUNICATION, DEPENDABILITY

Active Listening
Dependability
Interpersonal Skills
Judgement
Reliability and Attendance
Team Collaboration



EMPOWERMENT, INITIATIVE, JOB KNOWLEDGE

Adaptability
Continuous Learning
Initiative and Proactivity
Ownership
Resourcefulness
Timely & Accurate Task Completion



INCLUSION, COMPASSION, CUSTOMER SERVICE

Conflict Resolution & Sensitivity
Embracing Diversity
Empathy Active Listening
Encouraging Equity
Inclusive Language & Communication
Supportive Leadership



Collaboration, Communication, Dependability



James, Building Service Worker, F & S

Employee Self-Review Comments:

I go above and beyond to make sure our team operates at its best, and I regularly provide help and support to team members when working on a collective goal. In February, the sewer system backed up flooding the first-floor residence hall lounge. Our team quickly assessed the situation and worked together to get the area secured and cleaned in record time before students arrived for classes in the morning. The clean up involved several other BSW's from other buildings pulling together to prioritize this effort. I make sure to arrive to each shift early so that I know where first shift has left off and to ensure the transition is done smoothly.

Supervisor Comments (optional):

James is a reliable team member who regularly jumps in to help as needed. James is dependable, timely, and works well with other team members to complete work. Thanks so much – you are appreciated!



Empowerment, Initiative, and Job Knowledge



Sara, Technology Staff

Employee Self-Review Comments:

I demonstrate strong time management skills when hitting project deadlines. I have taken ownership of new projects and managed their successful completion. Several projects include a new internal ticketing system which allows our team to troubleshoot and prioritize issues affecting our area and track our response rate (<2 hours) to customer requests. I have received three kudos awards on my ability to troubleshoot issues quickly and efficiently so that our team is up and running. I am known for being “Johnny on the spot”.

Supervisor Comments (optional):

Sara has assisted with the new internal ticketing system, although she was not the primary owner of the project. Sara has been recognized for her ability to troubleshoot issues quickly – which is appreciated. I encourage Sara to balance timeliness with accuracy as there have been times that her work has had errors that have impacted her peers.



Inclusion, Compassion, and Customer Service



Marie, Office Manager

Employee Self-Review Comments:

I have made a conscious effort to foster a positive and inclusive work environment by promoting open communication and encouraging collaboration. This has resulted in a more cohesive and motivated team better equipped to meet our organizational goals. In our weekly team meetings, I recognize the contributions and achievements of my team members and create space for them to recognize each other, which elevates the team atmosphere that enhances our customer service centric approach internally and externally to the organization.

Supervisor Comments (optional):

I appreciate Marie's hard work in fostering an inclusive environment that promotes collaboration and communication. I agree that the team is more cohesive due to the environment that she has created. I encourage Marie to focus also on continual improvement in the next year to improve the efficiency of our processes to enhance the customer experience.

Developmental Coaching Questions



Accomplishments and Challenges:

1. What were two of your key accomplishments that you were most proud of this year? Why? (For example, this could include an outcome, improvement in skills, improvement in customer service, etc.)
2. Did you encounter significant barriers, challenges, or missed opportunities that impacted your performance or professional development? If so, please describe.
3. What assistance would be helpful from your team or your supervisor to support your success in the coming year?

Setting Future Goals and Development Opportunities



Job Responsibility

Review job responsibilities and create measurable components

Stretch Opportunity

Showcase growth in current role while gaining imperative skill sets

New Initiative

Introduce a new program, project, or process

Team Based

Contribution to a team project or process

Connect individual contributions to support unit's strategic objectives

Overall Rating Definitions



Rating	Definition
Outstanding	This rating recognizes employees who consistently excelled and made a significant and extraordinary impact in the organization. Rare and significant efforts were evident in their performance.
Achieved or Exceeded Expectations	This rating indicates that the employee consistently met or exceeded expectations. It highlights their reliability and ability to deliver quality work regularly.
Developing	This rating acknowledges that the employee made progress and took steps to improve their performance. It signals a positive trajectory and a commitment to growth.
Needs Significant Improvement	This rating indicates that the employee has not been meeting expectations and significant improvement is needed. This signals a negative trajectory and lack of a commitment to grow/develop/change.

Overall Summary on Performance Review



- Comments do not need to be lengthy
- Use bullet points
- Words/phrases are ok
- TSP – truthful, specific, positive
- Highlight accomplishments
- Identify development opportunities



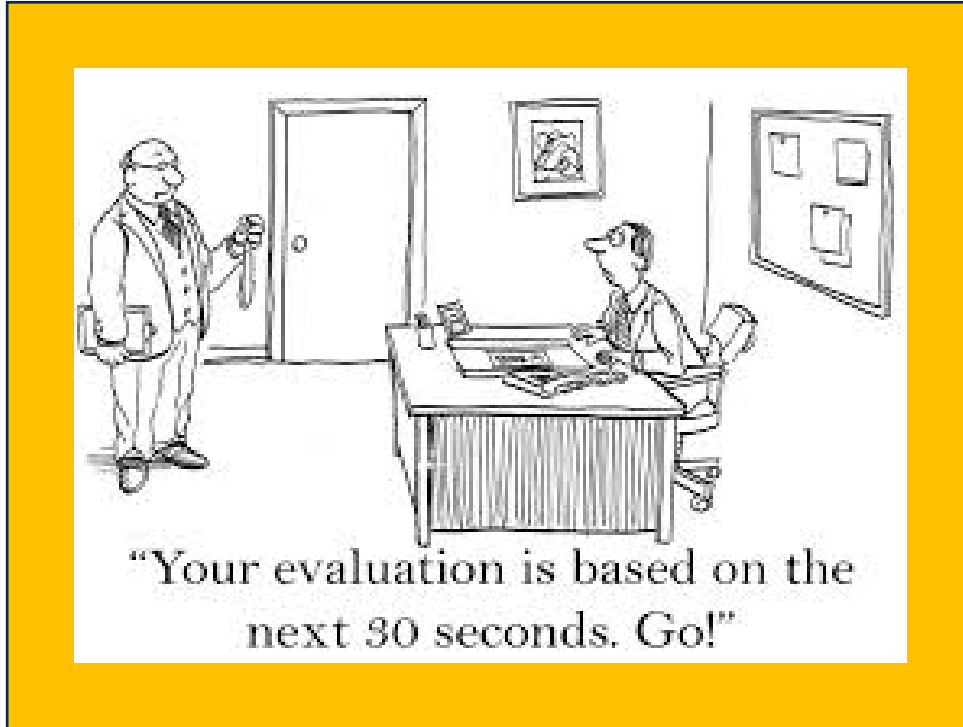


Demo

The background of the slide is a faded, orange-tinted image of the Statue of Justice, a large marble sculpture of a woman holding a scale and a sword, standing in a courtroom setting.

Watch for Potential Biases

Common Biases to Avoid

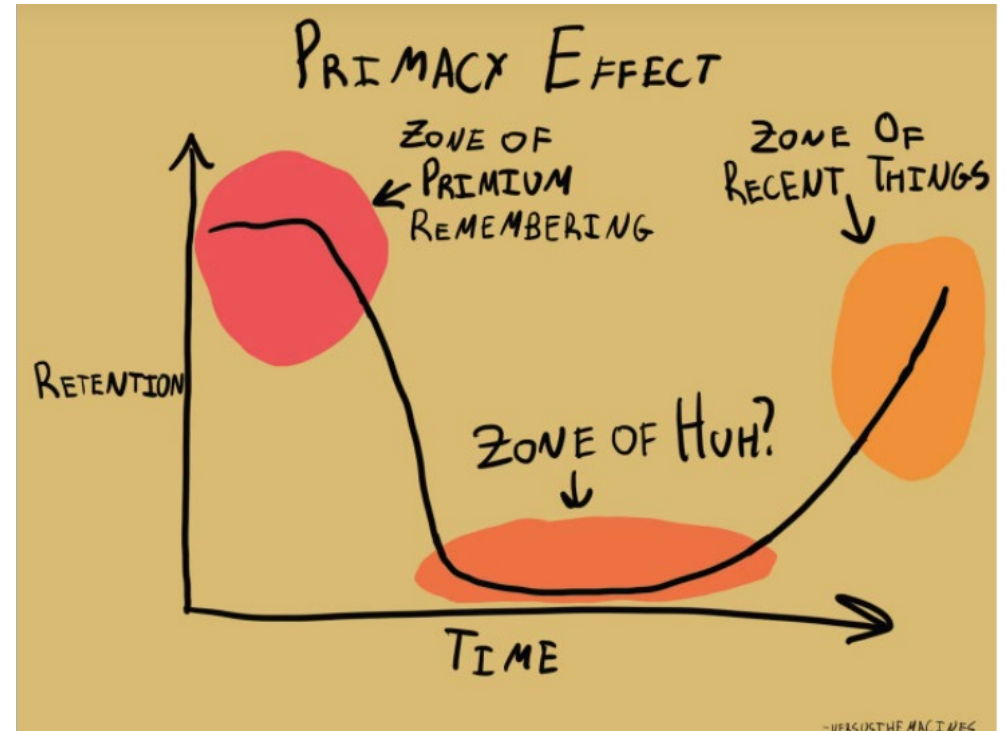


- **Recency Bias** – giving more weight to recent events and forgetting earlier events
- **Central Tendency Bias** – rating everyone as average
- **Leniency Bias** – rating everyone highly regardless of performance

Common Biases to Avoid



- **Primacy Bias**– focus on information learned early on
- **Proximity Bias** – tendency to give preferential treatment to certain employees simply because they are more visible
- **Affinity Bias** – favoritism towards people who share similar interests, backgrounds, and experiences with us



Considerations to Mitigate Bias



Recognize that we all have unconscious biases.



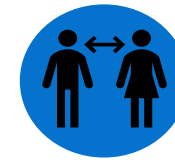
Find three pieces of evidence to explain your rating.



Investigate your own beliefs and assumptions.



Assess an individual's current performance



Gather feedback from others.



Document performance throughout the year.

Schedule the Annual Review



- Inform the employee in advance.
- Assure the right setting – privacy, time and timeliness, emotional atmosphere.
- Eliminate disruptions.





Focus on the Conversation Role Play

✓ Performance Conversation



Sara, Technology Staff

Sara is a member of the Technology Staff within IHR. Her supervisor, Dawn, is meeting with her to discuss her performance review. Sara has completed a self-review and shared it with Dawn prior to the meeting. Dawn completed the supervisor portion of the evaluation as well and shared it with Sara prior to the meeting. Sara and Dawn were generally in agreement on the evaluation, except for the **Inclusion, Compassion, and Customer Service** competency.

Conduct the Performance Review Meeting



- Discuss accomplishments and goal achievements.
- Shift from talking about ratings to talking about your employee's performance and career.
- Change from focusing on the past to focusing on the future.

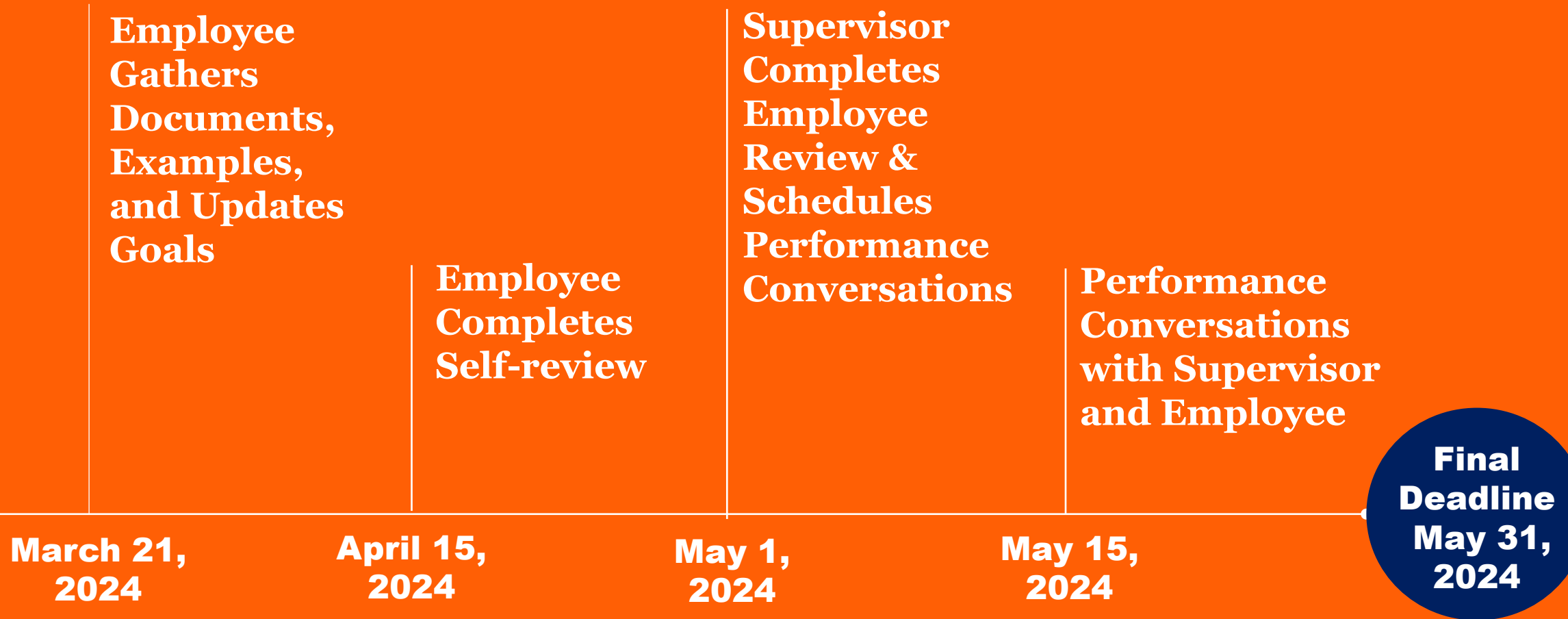


Employee Acknowledgment



- If an employee does not agree with their evaluation, they always have the option to provide a written statement to be included with their evaluation documents.
- Acknowledgment simply means that the information was shared with them.

Suggested Timeline



Summary



**Annual
Year End
Review
May 31**

- Same process for everyone, same competencies for everyone.
- Employees will finalize goals for this period in the system and complete a self-evaluate by May 1, 2024.
- Annual review is a tool for self-improvement and career advancement
- Supervisors will meet with the employee for a performance discussion before employee signs off.
- Provide feedback to the steering committee on the process using the Cornerstone tool.



Questions

BECKY HINRICHS

*Director, Employee Learning and
Organizational Effectiveness*

rh32@illinois.edu

ihr-learning@illinois.edu



UNIVERSITY OF
ILLINOIS
URBANA-CHAMPAIGN