



# MANAGER TRAINING: PERFORMANCE REVIEW FUNDAMENTALS

**Tuesday, June 3, 2025**

# TRAINING OBJECTIVES

- **Purpose** of a Performance Evaluation
- **Preparing** for an Effective Performance Evaluation
- **Writing** the Performance Evaluation
- **Conducting** a Constructive and Engaging Evaluation Conversation
- **Following Up** on Performance Throughout the Year



# WHAT IS THE PURPOSE OF A PERFORMANCE EVALUATION?

- Performance evaluations allow you to understand and improve an employee's performance, motivation, and goals.
- It is your responsibility as a supervisor to develop each team member towards their potential and drive the entire team towards their goals.



# PREPARING FOR AN EFFECTIVE PERFORMANCE EVALUATION

- Review the employee's past performance evaluations.
- Refamiliarize yourself with the employee's expectations, goals, and job description.
- Compile notes regarding what has happened since their last performance review.
  - They should include:
    - What is going well?
    - What adjustments are needed?
    - What skills are needed to develop?
- Review the employee's self-evaluation in comparison to your notes.



## Let's Bee-gin with Employee Beaker Bee



Flora Hiven, the team's lead Pollinator and Productivity Manager, is preparing Beaker Bee's annual review. Beaker has been busy buzzing from project to project, testing pollen samples, and collaborating across combs. But how did Beaker **really** perform? Flora needs your help to evaluate Beaker's strengths, challenges, and opportunities for growth. Let's review Beaker Bee's year in the hive.

# REVISITING THE JOB DESCRIPTION

- **Job Title:** Research & Pollination Specialist
- **Employee:** Beaker Bee
- **Essential Functions and Responsibilities:** Test pollen quality and record data, collaborate across combs on hive-wide projects, develop and deliver process improvements, communicate findings in buzz briefings, actively participate in hive meetings and learning events.
- **Required Knowledge, Skills and Abilities:** Ability to collect and analyze data accurately, ability to break down complex issues into actionable insights, ability to collaborate effectively as a team, ability to manage time and tasks efficiently, ability to solve problems creatively and resourcefully, ability to communicate clearly and professionally.

**Hive Hack: Job descriptions should be evaluated annually and submitted to Human Resources by July 1<sup>st</sup>**



**Our new templates are now available on the website, with the QR code to be available at the end of the presentation.**

# WRITING THE PERFORMANCE EVALUATION

- Reflect on the behaviors, skills, expertise, and abilities you have observed from Beaker
  - Including day-to-day output and progress/completion of goals
- **Essential Functions and Responsibilities:** Test pollen quality and record data, collaborate across combs on hive-wide projects, develop and deliver process improvements, communicate findings in buzz briefings, actively participate in hive meetings and learning events.
- Elaborate on these with specific examples illustrating how they impact each performance factor using the **STAR Method**, a comprehensive way to summarize your observation of how the employee approached a task, their contribution(s), and what the outcome was:
  - **Situation/Task:** Describe the situation and the task, including the goal to be achieved
  - **Action:** Describe the actions taken, including what the employee organized, completed, or supervised to accomplish the objective
  - **Results:** What did the employee accomplish, leave incomplete, or not achieve?

# IMPLEMENTING THE STAR METHOD (EXAMPLES)

## Strength/Achievement

### **Job Responsibility:**

#### **Test Pollen Quality and Record Data**

- **Situation:** During the Spring Bloom Survey, the hive needed accurate data on pollen viability to ensure honey quality.
- **Task:** Beaker was responsible for collecting and analyzing pollen samples from various flower zones.
- **Action:** Beaker meticulously collected samples, followed testing protocols precisely, and logged results in the Hive Research Repository.
- **Result:** Achieved 98% accuracy in pollen testing, identified lower viability in certain samples early, allowing the hive to avoid using subpar pollen. This ensured consistent honey quality and informed decisions about nectar sources.

## Opportunity for Improvement/Area of Growth

### **Job Responsibility:**

#### **Develop and Deliver Process Improvements**

- **Situation:** Earlier this season, the hive was exploring ways to enhance pollen freshness tracking and inventory logging.
- **Task:** Beaker was encouraged to take initiative by proposing and driving process improvement projects.
- **Action:** Beaker proposed a new pollen freshness tracking system, showing creativity, but did not develop an implementation plan or outline required resources, timeline, or stakeholder input. Reminders to revisit the idea were acknowledged but not followed up. A similar pattern occurred with the inventory logging automation idea, which remained without defined scope or next steps.
- **Result:** Due to the lack of follow-through, the hive was unable to evaluate or benefit from either proposal. Clear planning, timely execution, and ownership are needed to translate ideas into meaningful improvements.

# RATINGS

Rating and Description	Examples
5 – Significant overachievement of expectation.	Met and exceeded all established goals through proactive effort, attention to detail, and a strong results-oriented approach. Demonstrates a high level of reliability and excellence in every aspect of performance.
4 – Often beyond expectation.	Regularly takes initiative and delivers work that exceeds established goals and standards. Consistently anticipates team needs, identifies areas for improvement without being prompted, and implements effective solutions.
3 – Consistently fulfills expectation.	Consistently meets all core responsibilities with timely and accurate work. Demonstrates dependability by reliably completing tasks to expected standards.
2 – Inconsistent performance, with expectation only partially achieved.	While some responsibilities were completed successfully, there were noticeable gaps in reliability, follow-through, or quality of work. Improvement is needed to meet expectations consistently across all assigned areas.
1 –Failure to achieve expectation.	Did not meet established performance expectations. Most goals and deadlines were not met, and key responsibilities were not completed to the required standard.



# ACTIONABLE FEEDBACK AND RATINGS (EXAMPLES)

## **Feedback (Objective & Actionable):**

“You’ve maintained a 98% accuracy rate in pollen testing during the Spring Bloom Survey, which helped us prevent the use of low-viability pollen.

To continue building on this success, consider implementing cross-checks to further minimize potential oversights. Additionally, exploring opportunities to document and standardize your most effective techniques could help share best practices with the broader team.

**Suggested Rating: 3 – Consistently Fulfills Expectations**

## **Feedback (Objective & Actionable):**

“Earlier this season, you proposed a new pollen freshness tracking system, which demonstrated initiative and creativity. However, follow-through was limited. The proposal lacked a clear implementation plan, and no timeline, resources, or stakeholder input were documented. Additionally, reminders to revisit the idea during team check-ins were acknowledged but not acted upon. This pattern has also been observed with the suggested workflow automation for inventory logging, which remains in discussion with no drafted scope or next steps.

To improve, please focus on taking ownership of your improvement proposals. For future initiatives, I expect you to submit a basic pilot outline and a feasibility assessment by the end of the next cycle. Clear planning and consistent follow-through are necessary to meet expectations in this area.”

**Suggested Rating: 2 – Inconsistent Performance**

# SUBJECTIVE VS OBJECTIVE FEEDBACK

Subjective: “You’re doing really well – keep up the good work.”

**Objective:** “*You’ve met all deadlines this quarter and delivered work with minimal errors.*”

Subjective: “I need you to do better.”

**Objective:** “*Recent project outcomes show room to improve efficiency.*

***Let’s identify specific areas to increase your impact.***

Honest, Growth-Oriented Language

- “Here’s an area I’d like you to focus on...”
- “Here’s what I need to see from you in the next few weeks...”



# FINAL CHECK

- Proofread for grammar and consistency.
- Reference past goals and whether they were met or progressed.
- Highlight repeated strengths or ongoing challenges.
- Use specific examples that show change or development over time.
- Maintain a constructive tone while acknowledging past context.



# CONDUCTING PERFORMANCE REVIEWS IN THE HIVE

- An effective performance review should do the following:

- Highlight your employee's accomplishments.
- Identify areas for growth.
- Support them in setting clear, measurable, and actionable goals for the following cycle.



**Hive Hack: The Annual Performance Review should not be the first time employees receive feedback.**



# CONDUCTING AN EFFECTIVE PERFORMANCE REVIEW MEETING

- Schedule a separate, confidential meeting, allowing the meeting to solely focus on the performance review, aiming for 30 minutes to 1 hour.
- Open the conversation/set the stage, starting the meeting with a warm and welcoming tone and creating a safe space.
- Offer clear and constructive feedback, using concrete examples, highlighting their impact.
- Approach the meeting with a focus on listening, pay attention to what the employee is saying, and ask clarifying questions as needed.
- Clarify expectations and set a plan, setting SMART goals together.
- Summarize the main points and review to ensure mutual understanding.
- Close on a constructive and encouraging note.

# THE IMPORTANCE OF CANDID FEEDBACK



## Why It Matters:

- Helps employees understand exactly what they are doing well or need to improve.
- Encourages growth and supports clear goal-setting.
- Reinforces fair and effective evaluation.
- **Builds a department culture of consistency and transparency.**

# CO-CREATE SMART GOALS

1. Reflect Together
  - “What accomplishments are you most proud of?”
  - “Where do you feel there is room to grow?”

2. Prepare to Introduce Draft Goals
3. Co-Create SMART Goals
4. Professional Development Goal
5. Enter them in Workday



SMART Element	Beaker Bee Example
Specific	Propose a new pollen tracking system to improve freshness analysis.
Measurable	Present a pilot plan at one hive meeting and gather peer feedback.
Achievable	Dedicate one hour weekly to process improvement brainstorming.
Relevant	Enhances nectar production accuracy and supports hive quality goals.
Time-Bound	Submit final proposal to Flora by September 30, 2025.

**Hive Hack: Identify any support or resources needed to ensure success.**



# DO'S AND DON'TS OF EFFECTIVE PERFORMANCE REVIEWS

- Do prepare by reviewing job descriptions and goals
- Do give specific examples using the STAR method
- Do align feedback with department and institute goals
- Do provide measurable, actionable suggestions
- Do frame challenges as opportunities for growth
- Do document accurately and objectively
- Don't rely on vague praise ("Great job!" without context)
- Don't save all feedback for the annual review
- Don't generalize or assume performance without examples
- Don't avoid difficult conversations—be honest, not harsh
- Don't ignore metrics—use data to support your assessments
- Don't overlook updating the job description as part of the process



# 2024-2025 PERFORMANCE REVIEW PROCESS

- 1. Employee Self-Evaluation:** Due Friday, May 30th
- 2. Supervisor Evaluation:** Due Friday, June 27th
- 3. Manager/Cabinet-Level Review**
- 4. Human Resources Review**
- 5. Meeting Scheduling and Supervisor Submission to Employee:** Due Friday, July 11th
- 6. Employee Review**
- 7. Supervisor Finalization**



Once all steps are completed, the performance review is considered finalized and complete.

# PERFORMANCE REVIEW RESOURCES

**my.kgi.edu → Departments → Human Resources → Resources for Faculty and Staff → Reference Guides and Job Aids  
→ Performance Evaluation Guidance**

- [Performance Review Workflow](#)
- [Guidance for Writing an Effective and Impactful Self-Evaluation](#)
- [Faculty and Staff: Preparing and Submitting Self-Evaluations in Workday \(Step by Step Guide\)](#)
- [Supervisor: How to Complete Employee Evaluations in Workday \(Step by Step Guide\)](#)
- [Manager and Cabinet Level Supervisor: Completing the Final Review in Workday \(Step by Step Guide\)](#)
- [Annual Performance Self-Evaluations: Guidance for SMART Goal-Setting](#)
- [Annual Performance Reviews: Supervisor's Guide to Collaborating on SMART Goal-Setting](#)
- [Annual Performance Reviews: Supervisor's Guide to Writing Effective and Impactful Performance Reviews](#)
- [Sample Performance Review Phrases \(For Supervisors\)](#)
- [Annual Performance Reviews: A Guide to Help Supervisors Run an Effective Meeting](#)

Reach out to Human Resources at [HR@kgi.edu](mailto:HR@kgi.edu) for any assistance or support.



## FOLLOW UP THROUGHOUT THE YEAR

- Continually observing and analyzing the employee's actions and work habits.
- Engaging in ongoing conversations regarding performance.
- Ongoing feedback supports employees, managers, and teams by identifying and addressing issues in real time.
- Better understanding of what they are doing well and what areas need improvement.
- Opportunities to improve for timely correction.



# Q&A



*Thank you for helping me with  
my performance review!*