SKIDMORE COLLEGE

ACCOMPLISHMENT SUMMARY AND DEVELOPMENT REVIEW

SUPERVISOR GUIDELINES

NOTE - Performance Reviews are a PROCESS not a one time EVENT.

The Ideal Performance Review Cycle and Process

I. Performance Planning - The supervisor and employee meet to plan the upcoming year. In their discussions they agree on:
   - Goals & Objectives for the coming year (both goals to help the department meet its objectives, as well as personal developmental goals). This identifies WHAT will be achieved. Goals should be: Specific, Measurable, Achievable, Realistic and Time Bound (SMART).
   - The Position Questionnaire (PQ) should be reviewed regarding the employee’s responsibility for results that will be measured as part of their performance.
   - The performance factors - competencies or behaviors that will be important in determining HOW the results will be achieved.

II. Performance Execution - Over the course of the year the employee executes the plan agreed to in Phase I. The Supervisor is responsible for ONGOING FEEDBACK AND COACHING. If aspects of the plan become obsolete, they should be eliminated by mutual consent; new objectives to respond to changes in the department should be added. Hand write them on the Annual Goals and Objectives document and have a copy for both supervisor and employee.

III. Performance Assessment - At the end of evaluation cycle:
   a.) The employee completes her/his self evaluation based on goals and objectives, using either the Skidmore “Accomplishment Summary and Development Review” form (employee side) or letter form. Regardless of the format used, the self evaluation should include: accomplishments from the previous year, strengths the employees bring to the job and growth over the past year, necessary improvements and areas they believe they need to develop, a plan to meet those development needs, and a description of their career goals. The self evaluation is turned into the supervisor for review.

   b.) The supervisor completes his/her assessment of the employee’s performance over the past year, again, based on the goals and objectives set previously. The supervisor writes the summary of the performance on the Skidmore “Accomplishment Summary and Development Review” form (immediate supervisor side), or in letter form, to include the following aspects: accomplishments from the previous year, strengths the employees bring to the job and their growth over the past year, necessary improvements and areas they need to develop, a plan to meet those development needs, and a reaction to their career goals, and what they might need to do to meet them.

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While preparing the evaluation, the supervisor should consider the following:

- Know what you want to say, and say it precisely and clearly. Anyone picking up the document should be able to understand its meaning.
- Include a summary statement of the year’s overall performance rating period, this is a required field:
  - **Outstanding** *(Far exceeds normal expectations on a sustained basis. Recognized as an expert/authority. Strongly committed to the highest level of performance. Takes the initiative and provides leadership in identifying challenging goals and arriving at solutions that achieve results toward campus goals and initiatives.)*
  - **Excellent** *(Exceeds normal expectations in time, quality and scope in accomplishing most major objectives. Takes the initiative to develop challenging work goals. Thinks beyond the immediate assignment.)*
  - **Fully Satisfactory** *(Performance meets expectations for the position. Accomplishes major objectives with minimum difficulty and nearly always completes work/projects within approximate time frames. Could also be in assignment for less than 24 months exceeding expectations for that time frame.)*
  - **Needs Development** *(Performance is noticeably less than expected for the position. Generally meets some job requirements but struggles to fully meet them all. The need for further development and improvement is required.)*
  - **Unacceptable** *(Performance fails to meet minimum acceptable requirement for the position. Quality and/or timeliness of results are consistently below acceptable standards. Person requires an excessive amount of supervision. Stringent work plan is required immediately with significant improvement or removal from the position is appropriate.)*
- There are always positive aspects to an individual’s performance; observe them first.
- Even the best of employees have areas for improvements; be constructive and coach them in expanding their skills and contributions.
- Be sure to have specific examples of performance you are citing (strengths & areas for improvement) - they don’t all have to be part of the written format, but can be added verbally during the discussion. Make sure they are accurate and observable, not hearsay.
- Be prepared to offer to help and coach the employee through the necessary improvement areas and development suggestions.
- If there are serious performance issues, discuss your concerns with Human Resources prior to your discussion with the employee in order to understand your options and obligations as a supervisor.
- Be sure you have evaluated the entire year, and not just the most recent occurrences.
- Be absolutely certain you are evaluating performance - not personality!
- Evaluate performance regardless of your friendships or personal feelings toward the employee.
- Be sure you are evaluating the employee, rather than the function - unless that is part of his/her established area of responsibility as defined in their PQ.
- Be sure the feedback is based on job content and is free of bias or prejudice.
- Let your document sit for a couple of days, then go back and reread it, make adjustments regarding tone, clarity of message, objectivity and job relevance.

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The supervisor then gives her/his supervisor (1-over-1 review) the employee’s portion of the review, his/her supervisory assessment of the employee, as well as a copy of the Goals and Objectives for the coming year. The supervisor’s supervisor will read it over for objectivity, consistency within the division, as well as alignment with department, division and College goals and objectives. Following this 1-over-1 review, the documents are returned to the immediate supervisor to prepare for the performance review discussion with the employee.

IV. Performance Review Discussion

Before the Performance Review discussion, the supervisor should consider the following:

- Schedule a mutually convenient time and place for the discussion at least one week in advance.
- Avoid surprises - explain the purpose of the meeting to the employee and give the employee your written evaluation approximately 1 day prior to the discussion, to give him/her time to read it, and to prepare for a meaningful discussion.
- Allow enough time for a two-way discussion (approximately 1 hour).
- Ensure that there will be no interruptions, phones, people, beepers, etc.
- Anticipate the employee’s reactions, both positive and negative, and think through your potential responses.

Steps to consider in the discussion:

- Demonstrate respect and seriousness for the process.
- The employee should feel that nothing is more important to you than his/her performance review right now; be on time; verbalize how important this meeting and the employee are to you.
- State the purpose of the discussion; review why the College has chosen to use performance reviews.
- Describe the data you used in preparing your document (e.g., established goals and objectives, employee’s performance input, written documentation, feedback from others who work with the individual, customers, etc.).
- Verbally present your assessment of the employee’s performance, as stated on the document you gave him/her the day before. Add specific examples and tie it back to his/her input (where you agree and where you see things differently). Go through each section one at a time.
- Together discuss the differences and similarities and agree on the improvement needs and plans. Hand-write any changes right on the document.
- As you make suggestions, be sure you do not make comparisons to other employees in the department, or share another employee’s performance review.
- Close the discussion by summarizing what you have talked about and agreed upon; both of you sign and date the document at the bottom (remember--the employee is signing only to acknowledge that he/she has had the discussion, not that he/she necessarily agrees with all aspects or statements within the document. The document states, “I acknowledge that I have received a copy of this document and have discussed its content with my Supervisor on this date. My signature does not necessarily indicate agreement with any specific statement(s) included above, and I reserve the right to provide a written response, should I choose to do so.”). Make two copies of the signed documents, one for the employee, one for the supervisor. The original is sent to Human Resources for the employee’s official personnel file.
- If there is a performance problem, clearly explain the next steps (e.g. agreed upon early review, special weekly or monthly meetings, etc.).
- End with a positive comment if appropriate and thank the employee.

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V. **Performance Renewal and next year Goal & Objective planning** - Phase V repeats Phase I, incorporating the additional data and insights gained during the previous appraisal process. Together the employee and supervisor revise any of the employee’s key responsibilities as stated in their PQ and set new goals and objectives, standards and performance factors for the coming year. Finally, they develop a revised action plan to help the employee meet these goals and standards.

FOR ASSISTANCE - See your Dean or VP for help in writing and delivering effective performance reviews, or contact anyone on the Human Resource team for coaching, suggestions, and legal obligations.

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