



# Supervisors Performance Appraisal Series

Continuing to Manage Performance  
July 10, 2024



**UMSL** | We transform  
**LIVES**

UNIVERSITY OF MISSOURI-ST. LOUIS

# Reflect & Engage

- Am I understanding and correctly applying the rating scale?
- Do my employees have different perceptions of performance than me?
- Do my employees have a clear understanding of job expectations?
- Have things changed from previous years?
  - (ie. promotions, new supervisor, etc.)

# What Now?

What should I do if employees disagree with their evaluation comments or rating?

- Schedule a follow up meeting to seek further understanding – but please note, this is not an opportunity to negotiate the evaluation
  - Review job expectations
  - Review the rating criteria/descriptions
  - Provide clarifications and examples
- Consult with your HR partner

# Do I need to correct, grow, or promote my staff?

Correct

## 1 – Needs Improvement

- Does not consistently meet all expectations
- Additional direction and support is required

## 1.5 – Reliably Delivers

- Consistently meets expectations
- Sometimes needs additional direction and support beyond what would be expected in the role

## 2 – Reliably Delivers

- Consistently meets expectations and might exceed some expectations
- Requires little to no additional direction to achieve established responsibilities

## 2.5 – Reliably Delivers

- Frequently delivers beyond that which would be expected in the role

## 3 – Consistently Exceeds

- Consistently exceeds or delivers beyond expectations
- Influences others to perform better

Grow

Promote

# Correct 1/1.5

- **New Employees**
  - Dialogue/plan to support growth and independence
- **Letter of Expectation**
  - A corrective measure, not disciplinary action
  - Clarify expectations, responsibilities, and support
- **Performance Improvement Plan**
  - Formal corrective action, not discipline
  - Define performance gaps and performance concerns
  - Timeline for correction of serious areas of concern
  - Specific actions and expectations to be performed

# Grow 2/2.5

## Areas of Focus:

- Growth and improvement
- Addressing gaps in performance
- Increasing capacity
- Opportunities to reach the next level
- Documenting consistency in exceeding expectations
- Examples of impact on others
- Training and development opportunities

# Promote 3

## Questions to Guide You:

- Are there opportunities for career advancement?
- Are there opportunities to mentor others?
- What skills need to be strengthened for the next level?
- What experiences or challenges can I provide?

# Why Set Goals?

- To provide clarity of purpose
- To increase productivity and achievement
- To increase employee engagement and motivation
- To lay the groundwork for accountability and recognition
- To unify the team, unit, and organization
- To increase organizational efficiency
- To help the organization better handle complexity
- To accelerate execution of the organizational strategic plan





# Types of Goals

## Strategic

- Set by senior leaders
- What the organization wants to accomplish to better realize its mission and vision
- Spans the next 1-5 years

## Tactical

- Set by middle managers (deans/chairs)
- What the unit will do to support the strategic goals of the organization
- Spans the next 6 – 24 months

## Operational

- Set by employees in collaboration with their direct supervisor
- Specific, practical tasks the employee needs to do to help achieve tactical goals
- Spans the next week – 1 year

# Goal Setting Process

- Start with the organizational mission, vision, and values
- Review the strategic plan
- Determine which parts of the strategic plan are relevant to your unit
- Set unit level goals based on the strategic plan
- Set team goals based on unit goals
- Set individual goals based on team goals

# UMSL's Strategic Plan

- Pillars of the new strategic plan
  - Build a robust campus community
  - Elevate recruitment and retention
  - Shape the workforce of the future
  - Generate new knowledge
  - Advance St. Louis as an Anchor Institution
  - Develop stewardship and vitality

# Unit & Team Goals

- **Direction and Focus**
  - Provide a road map to guide team and individual work
- **Motivation and Engagement**
  - Shared success becomes a collective achievement
- **Improved Performance**
  - Setting team benchmarks pushes individuals to elevate performance
- **Evaluation**
  - Well defined goals make it easier to evaluate contributions

# Individual Goals

- Aligned to unit and team goals
- Reflect job description and job expectations
- Include challenges from most recent performance evaluation
- Incorporate training and development opportunities
- Provide opportunities to grow
- Include individual interests and contributions

# SMART Goals

- **Specific**
  - Clearly defined outcome/achievement
- **Measurable**
  - Quantifiable metrics
- **Action Oriented and Attainable**
  - Challenging yet realistic
- **Relevant**
  - Alignment to UMSL's overall objectives
- **Time Bound**
  - Defined timeframes and deadlines

# Goal Setting STAR

Schedule goal setting conversations

- Team and individual meetings
- Present goals, metrics, and a time for delivery
- Encourage feedback and conversation

Goal	Alignment (strategic plan, unit, team, individual)	Metric/I'll know it's accomplished when...	Timeline/when it can be completed	Resources/here's what I need to accomplish it
1.				
2.				
3.				

# The next eval cycle starts now

Don't Wait! Now is the time to...

- Provide clarity on job expectations
- Set goals and metrics
- Develop systems to track progress
- Offer new challenges, projects, and opportunities
- Encourage training and professional development
- Start using monthly check-ins to discuss expectations, performance, and progress