

# NeoGov Perform

**Performance Evaluation Training**

# Getting Started

- If you are not a current NeoGov user, you will receive an activation email from NeoGov with instructions to activate your account.
- Your username is your email address
- Throughout the evaluation process, you will receive emails from [noreply@neogov.net](mailto:noreply@neogov.net) notifying you of tasks such as ratings, approvals and signatures.

## LOGIN

To log into Perform, go to: <https://performance.neogov.com/login>.

Enter your username and password then click **Sign In**:

# NEOGOV

Username

Password

Log In

[Forgot username?](#)

[Forgot your password?](#)

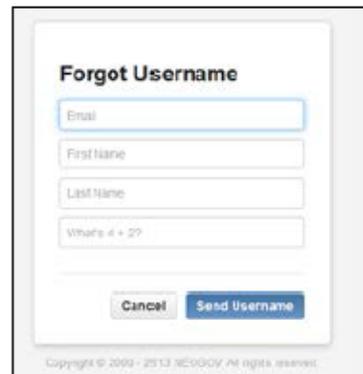
If you forget your password, click the "**Forgot your password?**" link. After entering the required information, an email will be sent to the email address in your profile containing a hyperlink to set a new password.



The screenshot shows a web form titled "Password Reset". It contains five input fields: "Username", "Email", "First Name", "Last Name", and "What's 3 + 5?". Below the fields are two buttons: "Cancel" and "Reset Password". At the bottom, there is a copyright notice: "Copyright © 2009 - 2013 NEOGOV. All rights reserved."

**NOTE:** Passwords must be a minimum of 8 characters and contain at least one number, one upper case letter, one lower case letter, and a special character (example: %\$#2&\*!).

If the username is forgotten, click the "**Forgot username?**" link. After entering the required information, a confirmation email will be sent to the email address in your profile with the username.



The screenshot shows a web form titled "Forgot Username". It contains four input fields: "Email", "First Name", "Last Name", and "What's 4 + 2?". Below the fields are two buttons: "Cancel" and "Send Username". At the bottom, there is a copyright notice: "Copyright © 2009 - 2013 NEOGOV. All rights reserved."

# Navigating the Dashboard

Upon logging into Perform, you will arrive at your **Dashboard**. The Dashboard is a central location from which all tasks can be completed in the system.

The **My Tasks** section contains all tasks currently requiring your action. Color-coded boxes, located within this section, can be used to filter the various task types:

The screenshot displays the NEOGOV Perform dashboard. The top navigation bar includes the NEOGOV logo, a 'Perform' dropdown menu, a search bar, and a user profile for Alex Jones. Below the navigation bar, there are tabs for 'Employees', 'Performance Evaluations', 'Library', and 'Reports'. The main content area is titled 'My Tasks' and features a summary bar with color-coded boxes for task counts: 5 Total (blue), 1 Rating (yellow), 1 Approve & Sign (orange), 1 Sign (green), 0 Approve (light blue), 2 Other (purple), and 5 Overdue (red). Below this bar is a table of tasks with columns for Task, For Employee, Related To, and Due Date. The tasks listed are: Rating For Ryan Horne's 2016 Performance Review (Due: 10/10/2016), Approve and Sign 2016 Performance Review for Mike Shin (Due: 10/20/2016), Review Goals with Ryan (Due: 10/26/2016), Sign 2016 Review for Alex Jones (Due: 10/26/2016), and Conduct Probationary Review (Due: 11/30/2016). Below the task list is a 'My Evaluations' section showing a '2016 Review' due on Oct 26, 2016, with a status of 'Not Started'. At the bottom, there is a 'My Direct Reports' section showing profiles for Jasmine Cho, Jeff Gold, Ryan Horne, Mike Shin, and Jessica Smith, each with a task count indicator.

Task	For Employee	Related To	Due Date
★ Rating For Ryan Horne's 2016 Performance Review	Ryan Horne	2016 Performance Review	10/10/2016
📄 Approve and Sign 2016 Performance Review for Mike Shin	Mike Shin	2016 Performance Review	10/20/2016
📄 Review Goals with Ryan	Ryan Horne	2016 Performance Review	10/26/2016
📄 Sign 2016 Review for Alex Jones	Alex Jones	2016 Review	10/26/2016
📄 Conduct Probationary Review	Jeff Gold	N/A	11/30/2016

The task types are designated as follows:

**Total:** All tasks currently requiring your action.

**Rating:** Any rating required on a self-evaluation, a Direct Report's evaluation, or a peer rating task.

**Approve and Sign:** Task to approve & sign the evaluation, after it's been rated.

**Sign:** Task to acknowledge an evaluation before rating can begin, or to sign the evaluation after it's been rated.

**Approve:** Task to approve the evaluation, after it's been rated.

**Other:** Any manual task such as having a meeting with your manager or an employee or adding goals to an evaluation.

**Overdue:** Any task with a past due date.

The following legend can be used to identify actions that can be taken from the Dashboard:

	= Rate an evaluation
	= Approve and sign
	= Sign

	= Approve an evaluation
	= Other tasks

**NOTE:** My Tasks only displays *current* tasks. To view all tasks, including pending or completed tasks, select the **view all** link in the upper left hand corner.

NEO GOV PE Perform

Employees Library Reports

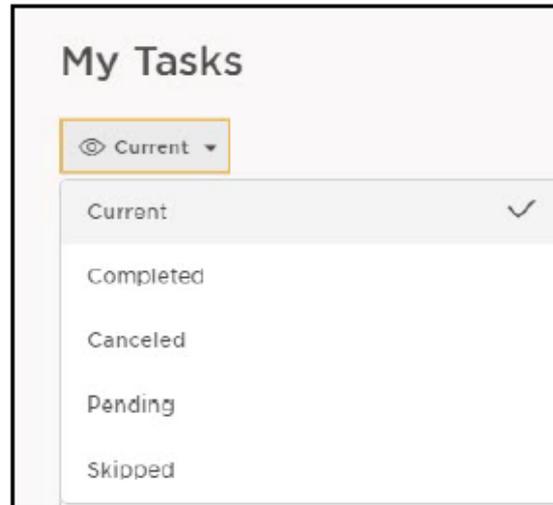
My Tasks [view all >](#)

2 Total	1 Rating	0 Approve & Sign
------------	-------------	---------------------

hide table ^

Task
Sign Annual Performance Appraisal for Jeff Gold
Rating For Jeff Gold's 2016

Use the **My Tasks** dropdown to filter the tasks by status. The various statuses are:



**Current:** tasks currently requiring action.

**Completed:** tasks you've already acted on.

**Canceled:** tasks no longer required.

**Pending:** tasks pending another user's action, hence your action not currently required; or tasks for *draft* evaluations.

**Skipped:** tasks that had been assigned to you, but skipped by an HR Admin.

# Completing Tasks

To complete a task, navigate back to the **My Tasks** section of your **Task Dashboard**.

**My Tasks** [view all >](#)

5 Total	1 Rating	1 Approve & Sign	1 Sign	0 Approve	2 Other	5 Overdue
------------	-------------	---------------------	-----------	--------------	------------	--------------

hide table

Task	For Employee	Related To	Due Date
★ Rating For Ryan Horne's 2016 Performance Review	Ryan Horne	2016 Performance Review	10/10/2016
📄 Approve and Sign 2016 Performance Review for Mike Shin	Mike Shin	2016 Performance Review	10/20/2016
📅 Review Goals with Ryan	Ryan Horne	2016 Performance Review	10/25/2016
📌 Sign 2016 Review for Alex Jones	Alex Jones	2016 Review	10/28/2016
📄 Conduct Probationary Review	Jeff Gold	N/A	11/30/2016

1 - 5 of 5 items

**My Evaluations** [view all of my evaluations >](#)

2016 Review

Click on a task to be completed. Once completed and saved, a green success banner will appear at the top of your page. The completed task will now filter out of your dashboard task list.

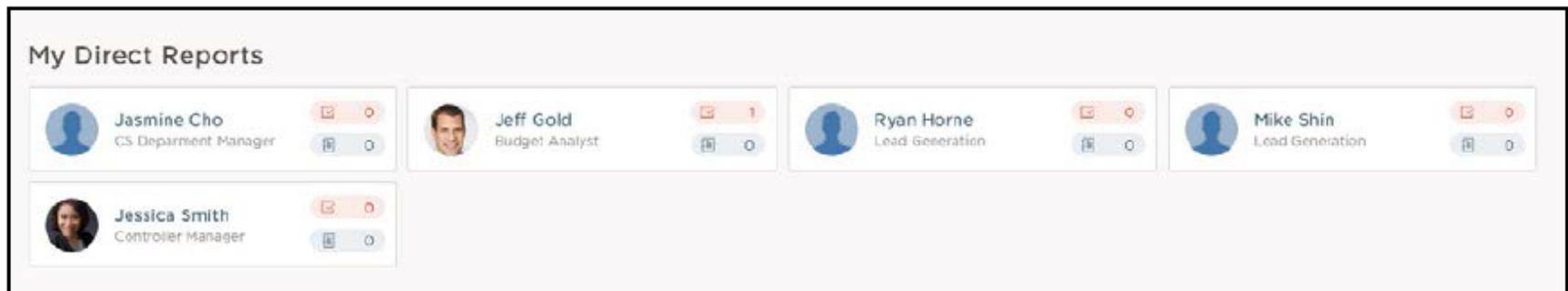
Underneath the tasks section of the Dashboard is the **My Evaluations** section. Here you will find up to three of your most recent performance evaluations. Select any one of the three evaluations to be redirected to the Evaluation Detail page for the corresponding evaluation:



The screenshot shows a section titled "My Evaluations" with a link to "view all of my evaluations". Below the title are three evaluation cards:

- Annual Performance Appraisal**: Due: Mon, Jul 03, 2017, Status: Not Started
- 2016**: Due: Mon, Nov 21, 2016, Status: Rating
- Performance Review, 2016**: Due: Mon, Nov 21, 2016, Status: Completed

Below your evaluations section, is **My Direct Reports**, listing all of your direct reports.



The screenshot shows a section titled "My Direct Reports" listing five employees:

- Jasmine Cho**, CS Department Manager: 1 overdue task, 0 journal entries
- Jeff Gold**, Budget Analyst: 1 overdue task, 0 journal entries
- Ryan Horne**, Lead Generation: 0 overdue tasks, 0 journal entries
- Mike Shin**, Lead Generation: 0 overdue tasks, 0 journal entries
- Jessica Smith**, Controller Manager: 0 overdue tasks, 0 journal entries

By clicking on the name of your direct report, you will be re-directed to their Employee detail page. Additionally, you can click into their overdue tasks,  **0**, or their journal entries,  **0**, and a fly-out will appear for the respective item.

To access your own **Employee Detail Page**, hover over your name in the top right corner. Select **My Profile**:



The screenshot displays the NEOGOV Perform dashboard. The top navigation bar includes the NEOGOV logo, a 'Perform' dropdown menu, a search bar, and notification icons. The user's name, 'Alex Jones', is visible in the top right corner, with a dropdown menu open below it. The dropdown menu contains the following options: 'My Profile' (highlighted with a red box), 'Account Settings', 'Help', and 'Sign Out'. Below the navigation bar, there are tabs for 'Employees', 'Performance Evaluations', 'Library', and 'Reports'. The main content area features a 'My Tasks' section with a 'view all >' link. Below this, there is a row of seven task cards with the following data:

Task Category	Count
Total	5
Rating	1
Approve & Sign	1
Sign	1
Approve	0
Other	2
Overdue	5

You are now in your Employee Detail Page:

The screenshot displays the NEOGOV Employee Detail Page for Alex Jones, a Senior Accountant. The page is organized into several sections:

- Employee Details:** A card containing personal and professional information:
  - Employee #: 1003
  - Email: mj@alex@neogov.net
  - Position: Senior Accountant
  - Address:
  - Phone:
  - Active: Yes
  - Class Spec:
  - Department: Finance
  - Division:
  - Online Access: Activated
  - Start Date: 06/08/2016
  - Separation Date:
- Performance Evaluations:** A table with a dropdown menu for "Evaluation List".

Evaluation Name	Evaluation Type	Due Date	Status	Completion Date	Archived	Actions
2016 Review	Periodic	10/26/2016	Not Started		No	
- Development Plans:** A table with a dropdown menu for "Development Plan Name".

Development Plan Name	Begin Date	End Date	Actions
No matching records			
- Tasks:** A table with a "+" button to add new tasks.

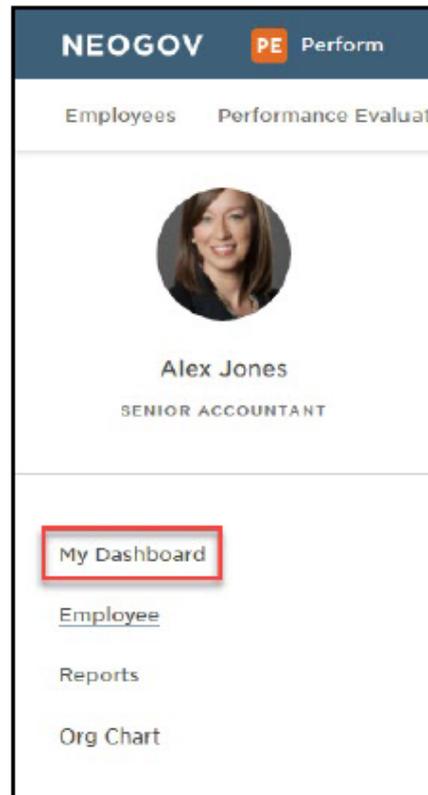
Assignee	Subject	Due Date	Status	Status Date	Actions
----------	---------	----------	--------	-------------	---------

The left sidebar contains navigation options: My Dashboard, Employee, Reports, Org Chart, Manager, and Direct Reports. The top navigation bar includes "NEO GOV", "Perform", a search bar, and a user profile for Alex Jones. A "FEEDBACK & HELP" button is located in the bottom right corner.

Here you can see any Performance Evaluations, Development Plans, and all tasks that are associated to you. Note, you can also add journal entries from this page.

You will also see your direct reports on your own **Employee Detail Page**. Click on the employee to navigate to their respective **Employee Detail Page**.

To navigate back to your Dashboard, select the **My Dashboard** link.



**TIP!** You can also click on the **NEOGO'V** link in the upper left to return to the Dashboard at any time.

To navigate to the **Performance Evaluations** List, select the **Performance Evaluations** drop down menu from your dashboard.

The screenshot shows the NEOGOV Performance Evaluations dashboard. At the top, there is a navigation bar with the NEOGOV logo, a 'Perform' dropdown menu, a search bar, and a user profile for Alex Jones. Below the navigation bar, there are tabs for 'Employees', 'Performance Evaluations', 'Library', and 'Reports'. The 'Performance Evaluations' dropdown menu is open, showing the 'Performance Evaluation List' option. Below the menu, there is a 'My Tasks' section with a 'view all' link. The 'My Tasks' section contains six summary cards: Total (5), Rating (1), Approve & Sign (1), Sign (1), Approve (0), Other (2), and Overdue (5). Below the summary cards, there is a 'side table' section with a search icon. The table has columns for Task, For Employee, Related To, and Due Date. The table contains five rows of tasks.

Task	For Employee	Related To	Due Date
★ Rating For Ryan Horne's 2016 Performance Review	Ryan Horne	2016 Performance Review	▲ 10/10/2016
📄 Approve and Sign 2016 Performance Review for Mike Shin	Mike Shin	2016 Performance Review	▲ 10/20/2016
📧 Review Goals with Ryan	Ryan Horne	2016 Performance Review	▲ 10/25/2016
📄 Sign 2016 Review for Alex Jones	Alex Jones	2016 Review	▲ 10/28/2016
📄 Conduct Probationary Review	Jeff Gold	N/A	▲ 11/30/2016

1 - 5 of 5 items

You are now in the **Performance Evaluations List**:

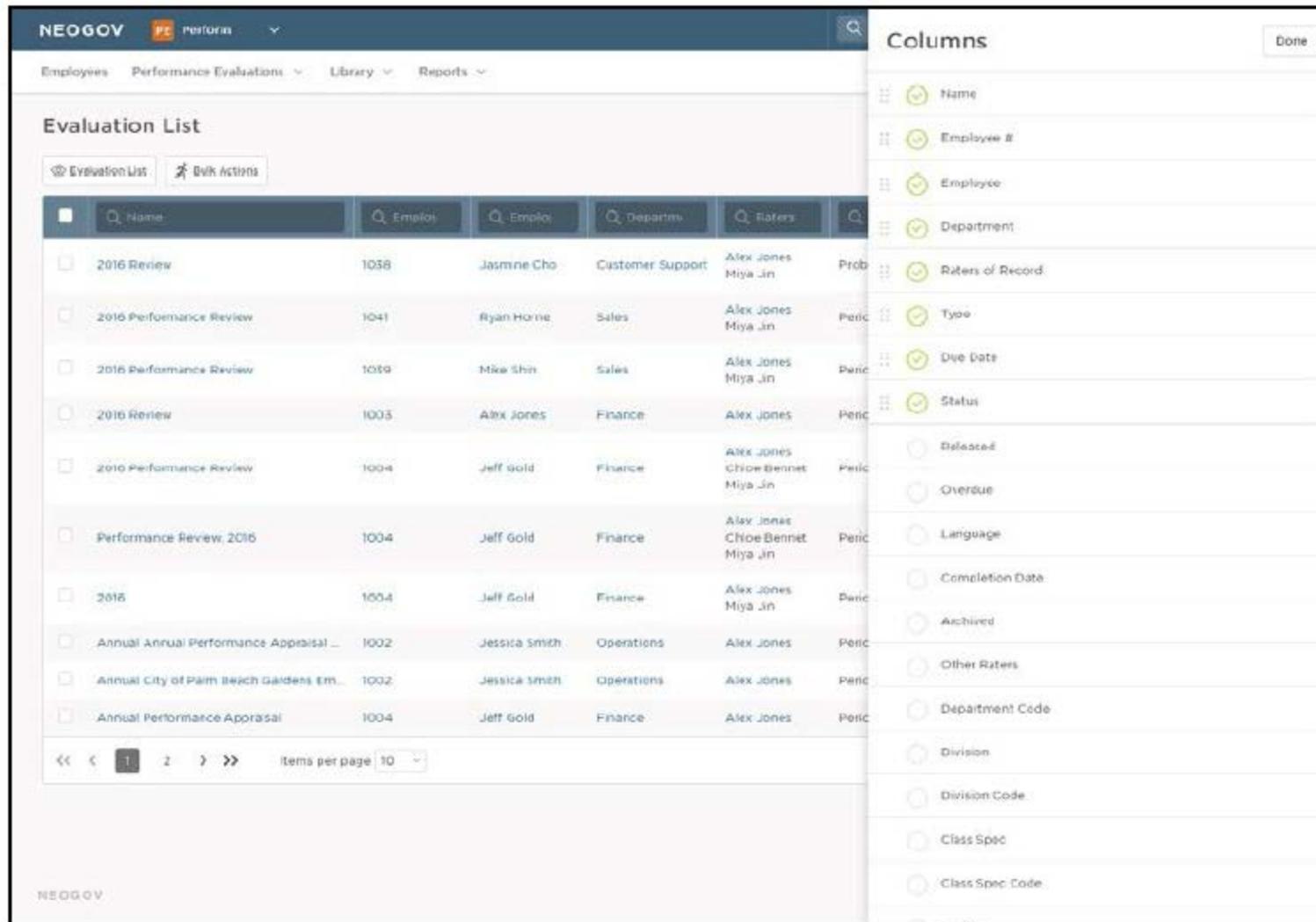
The screenshot displays the NEOGOV Performance Evaluations List interface. The page header includes the NEOGOV logo, a 'Perform' dropdown, a search bar, and user information for Alex Jones. The main content area is titled 'Evaluation List' and features a table of evaluation items. A red box highlights the 'Bulk Actions' icon in the top right corner of the table area.

	Name	Emplo	Emplo	Departm	Raters	Type	Due D	Status	Actions
<input type="checkbox"/>	2016 Review	1038	Jasmine Cho	Customer Support	Alex Jones Miya Jin	Probation	10/25/2016	Draft	
<input type="checkbox"/>	2016 Performance Review	1041	Ryan Horne	Sales	Alex Jones Miya Jin	Periodic	10/25/2016	Not Started	
<input type="checkbox"/>	2016 Performance Review	1039	Mike Shin	Sales	Alex Jones Miya Jin	Periodic	10/25/2016	Approval	
<input type="checkbox"/>	2016 Review	1005	Alex Jones	Finance	Alex Jones	Periodic	10/26/2016	Not Started	
<input type="checkbox"/>	2016 Performance Review	1004	Jeff Gold	Finance	Alex Jones Chloe Bennet Miya Jin	Periodic	11/15/2016	Completed	
<input type="checkbox"/>	Performance Review, 2016	1004	Jeff Gold	Finance	Alex Jones Chloe Bennet Miya Jin	Periodic	11/21/2016	Completed	
<input type="checkbox"/>	2016	1004	Jeff Gold	Finance	Alex Jones Miya Jin	Periodic	02/01/2017	Completed	
<input type="checkbox"/>	Annual Annual Performance Appraisal	1002	Jessica Smith	Operations	Alex Jones	Periodic	11/03/2017	Draft	
<input type="checkbox"/>	Annual City of Palm Beach Gardens Em...	1002	Jessica Smith	Operations	Alex Jones	Periodic	11/03/2017	Draft	
<input type="checkbox"/>	Annual Performance Appraisal	1004	Jeff Gold	Finance	Alex Jones	Periodic	02/03/2017	Not Started	

Navigation: 1 2 >> Items per page: 10 1 - 10 of 13 items

FEEDBACK & HELP

The Performance Evaluations List is a comprehensive list of your evaluations and your direct report's evaluations. You can add in additional fields to this list by selecting the field symbol, . A fly-out will appear with fields that can be added.



The screenshot shows the NEOGOV Performance Evaluations List interface. The main table displays a list of evaluations with columns for Name, Email, Employee, Department, and Raters. A 'Columns' fly-out menu is open on the right, showing a list of fields that can be added to the table. The 'Columns' menu includes fields such as Name, Employee #, Employee, Department, Raters of Record, Type, Due Date, Status, Deleted, Overdue, Language, Completion Date, Archived, Other Raters, Department Code, Division, Division Code, Class Spec, and Class Spec Code. The 'Done' button is visible in the top right corner of the fly-out menu.

Name	Email	Employee	Department	Raters	
2016 Review	1038	Jasmine Cho	Customer Support	Alex Jones Miya Jin	Prob
2016 Performance Review	1041	Ryan Horne	Sales	Alex Jones Miya Jin	Peric
2016 Performance Review	1039	Misa Shin	Sales	Alex Jones Miya Jin	Peric
2016 Review	1003	Alex Jones	Finance	Alex Jones	Peric
2016 Performance Review	1004	Jeff Gold	Finance	Alex Jones Chloe Bennet Miya Jin	Peric
Performance Review, 2016	1004	Jeff Gold	Finance	Alex Jones Chloe Bennet Miya Jin	Peric
2016	1004	Jeff Gold	Finance	Alex Jones Miya Jin	Peric
Annual Annual Performance Appraisal ...	1002	Jessica Smith	Operations	Alex Jones	Peric
Annual City of Palm Beach Gardens em...	1002	Jessica Smith	Operations	Alex Jones	Peric
Annual Performance Appraisal	1004	Jeff Gold	Finance	Alex Jones	Peric

Once all the desired fields are selected, you may bulk export or print the list. To do so, check the desired records or use the select all option:

The screenshot displays the NEOGOV Performance Evaluations interface. At the top, there is a navigation bar with the NEOGOV logo, a 'Perform' dropdown, a search bar, and a user profile for Alex Jones. Below the navigation bar, there are tabs for 'Employees', 'Performance Evaluations', 'Library', and 'Reports'. The main content area is titled 'Evaluation List' and features a table with 13 records. A red box highlights the 'Select all 13 records' button in the bulk actions bar. The table columns include Name, Employee, Employee, Department, Dates, Type, Due Date, Status, and Actions. The records are listed as follows:

Name	Employee	Employee	Department	Dates	Type	Due Date	Status	Actions
2016 Review	1038	Jasmine Cho	Customer Support	Alex Jones Miya Jin	Probation	10/25/2016	Draft	
2016 Performance Review	1041	Ryan Horne	Sales	Alex Jones Miya Jin	Periodic	10/23/2016	Not Started	
2016 Performance Review	1039	Mike Shin	Sales	Alex Jones Miya Jin	Periodic	10/25/2016	Approval	
2016 Review	1003	Alex Jones	Finance	Alex Jones	Periodic	10/26/2016	Not Started	
2016 Performance Review	1004	Jeff Gold	Finance	Alex Jones Chloe Bennet Miya Jin	Periodic	11/5/2016	Completed	
Performance Review, 2016	1004	Jeff Gold	Finance	Alex Jones Chloe Bennet Miya Jin	Periodic	11/21/2016	Completed	
2016	1004	Jeff Gold	Finance	Alex Jones Miya Jin	Periodic	02/01/2017	Completed	
Annual Annual Performance Appraisal	1002	Jessica Smith	Operations	Alex Jones	Periodic	11/03/2017	Draft	
Annual City of Palm Beach Gardens Em...	1002	Jessica Smith	Operations	Alex Jones	Periodic	11/03/2017	Draft	
Annual Performance Appraisal	1004	Jeff Gold	Finance	Alex Jones	Periodic	03/03/2017	Not Started	

At the bottom of the interface, there is a pagination bar showing '1 - 10 of 13 items' and a 'Feedback & Help' button on the right side.

When all records are selected, click on the **Bulk Actions** button and a fly-out will appear. Select the **Print** option to send the selected evaluations to a zip folder:

The screenshot displays the NEOGOV Performance Evaluations interface. The main area shows an 'Evaluation List' with 10 records selected. A 'Bulk Actions' button is highlighted with a red box. An 'Actions' fly-out menu is open on the right, also with a red box around it, showing options under 'EXPORT ACTIONS' (Export to PDF, Export to Excel, Export to CSV) and 'EVALUATION BULK ACTIONS' (Assign Goals, Print). The 'Print' option is selected.

Name	Employee	Employee	Department	Reviewers	Type
2016 Review	1038	Jasmine Cho	Customer Support	Alex Jones Miya Jin	Probation
2016 Performance Review	1041	Ryan Home	Sales	Alex Jones Miya Jin	Periodic
2016 Performance Review	1039	Mike Shin	Sales	Alex Jones Miya Jin	Periodic
2016 Review	1003	Alex Jones	Finance	Alex Jones	Periodic
2016 Performance Review	1004	Jeff Gold	Finance	Alex Jones Chloe Bernat Miya Jin	Periodic
Performance Review: 2016	1004	Jeff Gold	Finance	Alex Jones Chloe Bernat Miya Jin	Periodic
2016	1004	Jeff Gold	Finance	Alex Jones Miya Jin	Periodic
Annual Annual Performance Appraisal ...	1002	Jessica Smith	Operations	Alex Jones	Periodic
Annual City of Palm Beach Gardens Em...	1002	Jessica Smith	Operations	Alex Jones	Periodic
Annual Performance Appraisal	1004	Jeff Gold	Finance	Alex Jones	Periodic

From the zip folder, the evaluations can be downloaded, saved or sent to print.

**TIP!** To export a list view of the evaluations, with all columns shown on the screen, use the **Export to PDF**, **Export to Excel** or **Export to CSV** options. Note that this is not the same as exporting the actual evaluations for printing, as seen above.

# Adding Previous/Current Goals

Managers are required to add Goals to their Direct Report's evaluations. Goals can be added to the individual evaluation, or assigned in bulk to multiple employees.

**NOTE:** Remember, any manual tasks, such as adding goals to an evaluation will be located under the *Other* status.

To add goals to an individual evaluation, select the task name from your task list:

My Tasks [view all](#) >

2 Total	1 Rating	0 Approve And Sign	0 Sign	0 Approve	1 Other	1 Overdue
------------	-------------	-----------------------	-----------	--------------	------------	--------------

hide table ^

Task	For Employee	Related To	Due Date
<input checked="" type="checkbox"/> Add previous/current goals to the evaluation	Test Employee	Annual Evaluation Form - All Employees (due 10/01/2017) <span style="color: red;">⚠</span> 11/17/2016	
☆ Rating For Test Employee's test evaluation on shift bids	Test Employee	test evaluation on shift bids	12/08/2017

1 - 2 of 2 items

You are required to add the **Previous Evaluation Goals** to the evaluation. The first evaluation you complete in Perform, you will need to enter the goals. When you complete subsequent evaluations for the employee, you will be able to automatically import them from the last scheduled evaluation.

Click the **+ Add Items** button:

Add Items Complete Task

GOAL SECTION | TEXT ONLY

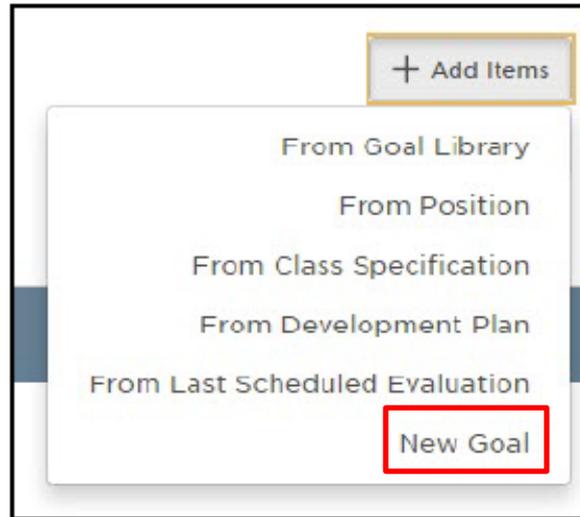
**Previous Evaluation Goals**

Use this section to document progress on goals from previous evaluations.

+ Add Items

Items	Description	Progress	Actions
No items to display			

A dropdown menu with different options will appear:



Select **New Goal** and enter the Goal Name, Goal Due Date, Category, and Description. You can add Priority Level by clicking ADDITIONAL SETTINGS and Reminder Notices by clicking REMINDER SETTINGS.

Click Save to move to the next goal. Add additional goals as needed.

When all **Previous Evaluation Goals** have been entered, click **Complete Task** and a fly-out will appear. You can adjust the **Progress** bar to indicate level of completion.

Add Items

Complete Task

GOAL SECTION | TEXT ONLY

### Previous Evaluation Goals

Use this section to document progress on goals from previous evaluations.

+ Add Items

Items	Description	Progress	Due Date	Actions
⋮ Customer Service Training	Attend one Customer Service training.	0% 	 07/30/2017	 

Update the status on the fly-out and add Comments. Click **Save**.

## Task Detail

Cancel

Save

### Title

Add previous/current goals to the evaluation

### Related to

Annual Evaluation Form - All Employees (due 10/01/2017) (Annual Evaluation Form - All Employees (due 10/01/2017))

### Due Date

11/17/2016

### Update status from Current to

Completed



### Comments

Test Employee attended a training class on 7/1/17

**Goals are not weighted and will not affect the scoring of an employee's performance evaluation.**

You will be returned to the Employee's Evaluation screen.

Click the NeoGov logo in the left hand corner to return to your dashboard.

**NEOGOV** PE Perform

Search

Kathy Jo K

Employees Performance Evaluations Library Positions Administrative Trainings Reports

**Annual Evaluation Form - All Employees (due 10/01/2017)**  
Test Employee

rate print preview copy evaluation print blank form pause evaluation Cancel Evaluation

**Total Score**  
Pending

**General Information**

<b>DUE DATE</b> Sun. Oct. 01, 2017	<b>STATUS</b> Not Started
<b>Evaluation Name</b> Annual Evaluation Form - All Employees (due 10/01/2017)	<b>Employee</b> Test Employee
<b>Type</b> Periodic	<b>Position</b> Test Position 1
<b>Archived</b> No	<b>Department</b> Human Resources

**Content**

**100%**

**COMPETENCY SECTION | 4 POINT SCALE**

**Values**

Based on these core values, Douglas County employees are dedicated to providing essential and cost-effective public services fostering a safe, healthy, scenic, and vibrant community for the enjoyment of our residents and visitors. Employees are evaluated on their performance based on these core values.

# Rating an Evaluation

Once back in your dashboard, you will see a Rating task.

Click in either location to access the Employee's evaluation.

My Tasks [view all](#) >

2 Total	2 Rating	0 Approve And Sign	0 Sign	0 Approve	0 Other	0 Overdue
------------	-------------	-----------------------	-----------	--------------	------------	--------------

hide table ^

Task	For Employee	Related To	Due Date
★ Rating For Test Employee's Annual Evaluation Form - All Employees (due 10/01/2017)	Test Employee	Annual Evaluation Form - All Employees (due 10/01/2017)	09/16/2017
★ Rating For Test Employee's test evaluation on shift bids	Test Employee	test evaluation on shift bids	12/08/2017

1 - 2 of 2 items

You are now in the **Rating Detail** page of the evaluation. Click into a section header on the left-hand side. Any content in that section will appear on the right:



**Test Employee**  
TEST POSITION 1

SECTIONS

- Goal Section 
- Competency Section **
- Overall Comments
- Summary

COMPETENCY SECTION | 4 POINT SCALE

### Values

Based on these core values, Douglas County employees are dedicated to providing essential and cost-effective public services fostering a safe and healthy community. Employees are evaluated on their performance based on these core values.

Integrity	 no comment
Accountability	 no comment
Customer Service	 no comment
Leadership	 no comment
Communication	 no comment
Teamwork	 no comment

Click into an item name, i.e. Integrity, within a section and a fly-out of the **Rating Card** will appear:

COMPETENCY SECTION | 4 POINT SCALE

## Values

Based on these core values, Douglas County employees are dedicated to providing essential and cost-effective public services fostering a safe and healthy community. Employees are evaluated on their performance based on these core values.

Integrity	 no comment
Accountability	 no comment
Customer Service	 no comment
Leadership	 no comment
Communication	 no comment
Teamwork	 no comment



Done

Next >

Total Score 0.00

## Integrity

The employee demonstrates honest and ethical conduct through their actions at all times.

### RATING SCALE

\* Rating is required

[Show descriptions >](#)

- 0 Requires Substantial Improvement
- 1 Opportunity for Improvement
- 2 Meets Expectation
- 3 Exceeds Expectation

### COMMENTS

**B** *I* U

You will see a **Rating Scale**. To view a description of each rating scale value, select the **Show descriptions** button:

**RATING SCALE** \* Rating is required

---

Show descriptions >

- 0 Requires Substantial Improvement
- 1 Opportunity for Improvement
- 2 Meets Expectation
- 3 Exceeds Expectation



A fly-out will appear with detailed descriptions. Select The desired rating level in the fly-out, or click **Close** to go back to the Rating Card.:

## Rating Scale

---

Close

0

Requires Substantial Improvement

Employee requires substantial improvement in this area. Failure to improve performance could result in disciplinary action, up to and including termination of employment.

1

Opportunity for Improvement

Provide details to the employee regarding opportunities for improvement.

2

Meets Expectation

Meet requirements of the position.

3

Exceeds Expectation

Provide specifics to the employee regarding ways they exceed expectations.

Once you have selected the **Rating** for the **Value**, add detailed comments to the **Comments** box. If any Journal Entries have been made by either the Manager or the Employee, they will appear to the right of the Evaluation. Click **Next** to move to the next **Value**.

ITEM WEIGHT: 16.66%

### Integrity

The employee demonstrates honest and ethical conduct through their actions at all times.

#### RATING SCALE

[Show descriptions >](#)

- 0 Requires Substantial Improvement
- 1 Opportunity for Improvement
- 2 Meets Expectation**
- 3 Exceeds Expectation

#### COMMENTS

\* Required

**B** *I* U    

Test Employee maintains high standards of integrity across the department and County. He makes decisions that consistently reflect his strong commitment to acting reputably. Test Employee quickly dismisses less-than-exemplary options and always makes choices based on honest and ethical standards.

Comments are required for each **Value** rating.

You can select **+Add to Comment Box** beside the **FEEDBACK ENTRIES** and the entry will move to the Comment box.

ITEM WEIGHT: 16.67%

### Customer Service

The employee delivers efficient and effective service with an attitude of respect and fairness.

**RATING SCALE** \* Rating is required

[Show descriptions >](#)

- 0 Requires Substantial Improvement
- 1 Opportunity for Improvement
- 2 Meets Expectation
- 3 Exceeds Expectation**

**COMMENTS** \* Req

**B I U**

Test employee received an award from XYZ.

### FEEDBACK ENTRIES

Award



Test Manager created entry on 07/27/17 at 10:55:28 AM • shared

Test employee received an award from XYZ.

Comment Added

Repeat the **Rating Step** for each **Value**.

# Future Goals – Click **+Add Item** and select **New Goal** and complete all of the required fields on the **Add Goal** screen and click **Save**. Enter the remaining goals.

[< back to evaluation detail page](#)

Total Score 2.50

[Submit Evaluation](#)



Test Employee  
TEST POSITION 1



## Annual Evaluation Form - All Employees (due 10/01/2017)

GOAL SECTION | FUTURE/LIST

### Goals

Enter 2-3 goals for the employee for the upcoming evaluation period. Be specific with time period to accomplish the goals and what is to be accomplished. Goals should be Specific, Measurable, Attainable, Realistic and Time-based, and meet the goals and objectives of the individual, the department and the County as a whole. Goals can be short-term (days or weeks) to long-term (up to a year).

[+ Add Item](#)



No items in this section

\* Fields are required.

Goal Name \*

Goal Due Date

Category \*

[New](#)

Description

ADDITIONAL SETTINGS



REMINDER SETTINGS



**Overall Comments** – Click **Overall Comments** on the left side of the screen. Then click **Overall Comments** in middle of the screen. Enter comments

Employees Performance Evaluations Library Positions Administrative Trainings Reports

[< back to evaluation detail page](#)

 Test Employee  
TEST POSITION 1



Annual Evaluation Form - All Employees (due 10/01/2017)

SECTIONS

Values ✓

Goals ✓

Previous Evaluation Goals ✓

**Overall Comments**

 Summary

### Overall Comments

Overall Comments



no comment

Click **Done** when you are finished with your comments.



Overall Rating

Done

Total Score 2.50

 COMMENTS

**B** *I* U    

Test Employee has done a great job and continues to be an asset to the team.

Click **Print Current State** to review the evaluation and make any necessary changes. Once you are finished with the evaluation click **Submit Evaluation** to move the evaluation to the next step.

Total Score 2.50 [Submit Evaluation](#)

Annual Evaluation Form - All Employees (due 10/01/2017) [Print Current State](#)

[RATING DETAILS](#) [RATING CHART](#) [Expand all cards](#)

COMPETENCY SECTION | 4 POINT SCALE | SECTION WEIGHT 100.00 %

### Values

Based on these core values, Douglas County employees are dedicated to providing essential and cost-effective public services fostering a safe, healthy, scenic, and vibrant community for the enjoyment of our residents and visitors. Employees are evaluated on their performance based on these core values.

<b>Integrity</b>	2 Meets Expectation	Test Employee maintains high standards of	16.66 %	>
<b>Accountability</b>	2 Meets Expectation	Test Employee is very responsible to his tea	16.66 %	>
<b>Customer Service</b>	3 Exceeds Expectation	Test employee received an award from XYZ	16.67 %	>
<b>Leadership</b>	3 Exceeds Expectation	Test Employee acknowledge the accompli	16.67 %	>
<b>Communication</b>	3 Exceeds Expectation	Test Employee has excellent written and ve	16.67 %	>
<b>Teamwork</b>	2 Meets Expectation	Test Employee consistently displays a team	16.67 %	>

GOAL SECTION | FUTURE/LIST

### Goals

Enter 2-3 goals for the employee for the upcoming evaluation period. Be specific with time period to accomplish the goals and what is to be accomplished. Goals should be Specific, Measurable, Attainable, Realistic and Time-based, and meet the goals and objectives of the individual, the department and the County as a whole. Goals can be short-term (days or weeks) to long-term (up to a year).

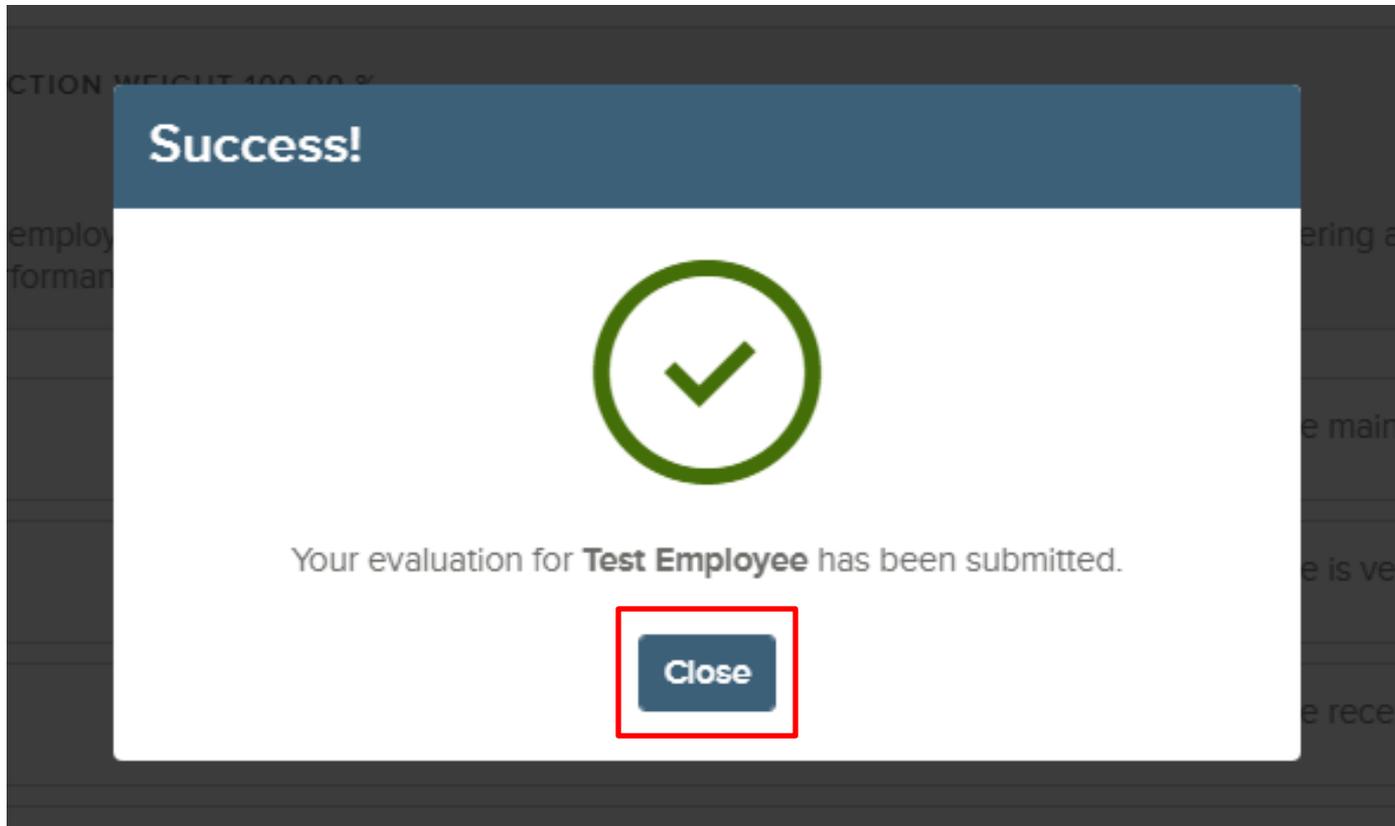
[FEEDBACK & HELP](#)

[Feedback & Help](#)

Click **Continue** to certify and submit your rating. Once this is done, you cannot make changes to the ratings without administrator assistance.

The image shows a confirmation dialog box overlaid on a blurred background. The dialog box has a dark blue header with the text "You're almost done!". Below the header, there is a white area containing the following text: "By clicking certify and submit, you confirm that your rating is complete and accurate. Once your rating is submitted, you will no longer be able to make changes without administrator assistance." Below this text is a signature in blue cursive that reads "Kathy Jo Kidd". Underneath the signature is the question "Do you wish to continue?". At the bottom of the dialog box are two buttons: a white "Cancel" button and a dark blue "Continue" button. The background behind the dialog box is dark and contains faint, partially visible text such as "SECTION", "county employ", "r performan", "ering a safe", "e maintains", "e is very res", "e received", "3 Exceeds Expectation", and "Test Employee acknowle".

A **Success!** box will appear to notify you the evaluation has been submitted. Click **Close**.



The evaluation is now moved to the **Manager's Manager** approval stage. The **Manager's Manager** will receive an email notifying them of a task in NeoGov. The **Manager's Manager** will see the following when logging into their NeoGov Dashboard. Click on either location to open the task.

The screenshot displays the NeoGov dashboard interface. At the top, there is a dark blue header with the 'NEOGOV' logo and a 'PE Perform' dropdown menu. Below the header is a navigation bar with links for 'Employees', 'Performance Evaluations', 'Library', 'Positions', 'Administrative', 'Trainings', and 'Reports'. The main content area is titled 'My Tasks' with a 'view all' link. Below this is a summary table with four columns: 'Total' (1), 'Rating' (0), 'Approve And Sign' (1), and 'Sign' (0). The 'Total' cell is highlighted with a red box. Below the summary table is a 'hide table' link. At the bottom, there is a table with two columns: 'Task' and 'For Employee'. The first row in the 'Task' column is highlighted with a red box and contains the text 'Approve and Sign Annual Evaluation Form - All Employees (due 10/01/2017) for Test Employee'. The corresponding 'For Employee' value is 'Test Employee'.

Task	For Employee
Approve and Sign Annual Evaluation Form - All Employees (due 10/01/2017) for Test Employee	Test Employee

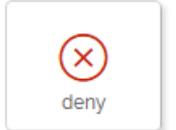
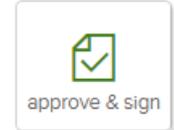
The **Manager's Manager** will review the evaluation and either **approve & sign** or **deny**.

EVALUATION NAME

Annual Evaluation Form - All Employees (due  
10/01/2017)

DUE DATE

Sun. Oct. 01, 2017



If **Approve & Sign** is selected, enter comments and **Submit**.

Approve & Sign

Cancel

Submit

Comments

Write comment here...

Please sign your name below

Wendy Lang

Wendy Lang

August 21, 2017

[Auto-Generate](#)

[Draw Signature](#)

If **Deny** is selected, enter comments and **Save**. The evaluation will be returned to the **Rating Manager** for editing and resubmission.

Deny

Cancel Save

\* Fields are required.

 Kathy Jo Kidd  
Senior Human Resources Analyst

Comments \*

Please add XYZ to the evaluation.

The evaluation is now ready for the **Rating Manager** to approve and sign. Open the evaluation by clicking either of the **Task** links on the dashboard.

**NEOGOV** PE Perform ▼

[Employees](#) [Performance Evaluations](#) ▼ [Library](#) ▼ [Positions](#) ▼ [Administrative](#) ▼ [Trainings](#) [Reports](#) ▼

**My Tasks** [view all](#) >

2 Total	1 Rating	1 Approve And Sign	0 Sign
------------	-------------	-----------------------	-----------

hide table ^

Task	For Employee
 Approve and Sign Annual Evaluation Form - All Employees (due 10/01/2017) for Test Employee	<a href="#">Test Employee</a>
 Rating For Test Employee's test evaluation on shift bids	<a href="#">Test Employee</a>

Click **approve & sign**.

### After Ratings

 **Test Employee**  
Test Position 1

EVALUATION NAME: Annual Evaluation Form - All Employees (due 10/01/2017)

DUE DATE: Sun. Oct. 01, 2017

[approve & sign](#) [deny](#)

### Rating Summary

 **Kathy Jo Kidd**  
Senior Human Resources Analyst

Total Score: **2.5**

Weight: **100 %**

[View Other Approvers](#)

[Rating Details](#)

[Rating Chart](#)

SECTIONS

[Expand all sections](#)

Values

COMPETENCY SECTION | 4 POINT SCALE | SECTION WEIGHT 100 %

#### Values

Based on these core values, Douglas County employees are dedicated to providing essential and cost-effective public services fostering a safe, healthy, scenic, and vibrant community for the enjoyment of our residents and visitors. Employees are evaluated on their performance based on these core values.

[Expand Section](#)

The evaluation is now ready for the **Employee** to access and sign.

The **Employee** will log into their account to access their evaluation. They will open the evaluation by clicking either of the **Task** links on the dashboard.

My Tasks [view all >](#)

1 Total	0 Rating	0 Approve And Sign	1 Sign
------------	-------------	-----------------------	-----------

hide table ^

Task	For Employee
 Sign Annual Evaluation Form - All Employees (due 10/01/2017) for Test Employee	Test Employee

My Evaluations [view all of my evaluations >](#)

 <b>test evaluation on shift bids</b> Due: <b>Thu, Dec 28, 2017</b> Status: <b>Not Started</b>	 <b>Libby Test</b> Due: <b>Sun, Dec 10, 2017</b> Status: <b>Completed</b>
---	--

The **Employee** can review all sections from this screen and then click **approve & sign**.

### After Ratings

 <b>Test Employee</b> Test Position 1	EVALUATION NAME Annual Evaluation Form - All Employees (due 10/01/2017)	DUE DATE Sun. Oct. 01, 2017	
--	---	--------------------------------	---

### Rating Summary

[View Other Approvers >](#)

 <b>Kathy Jo Kidd</b> Senior Human Resources Analyst	Total Score <b>2.5</b>	Weight <b>100 %</b>
--	---------------------------	------------------------

[Rating Details](#) [Rating Chart](#)

SECTIONS	Collapse all sections ^	
Values	<b>COMPETENCY SECTION   4 POINT SCALE</b> <b>Values</b> Based on these core values, Douglas County employees are dedicated to providing essential and cost-effective public services fostering a safe, healthy, scenic, and vibrant community for the enjoyment of our residents and visitors. Employees are evaluated on their performance based on these core values. <a href="#">Collapse Section</a>	
Goals		
Previous Evaluation Goals		
Overall Rating		
ALL SECTIONS	 <b>Kathy Jo Kidd</b>	<b>2</b> Meets Expectation  Test Employee maintains high standards of integrity across the department and County. He makes decisions that consistently reflect his strong commitment to acting reputably. Test Employee quickly dismisses less-than-exemplary options and always makes choices based on honest and ethical standards.
	<b>Accountability</b> The employee accepts responsibility for their actions.	

The **Employee** can enter **Comments**. Once comments have been entered, the **Employee** will click **Submit**.

---

Sign Cancel Submit

---

Comments

Write comment here...

Please sign your name below

*Test Employee*

---

Test Employee August 21, 2017

Auto-Generate Draw Signature

The evaluation can be printed by either the **Manager** or **Employee**. To print, return to the Dashboard and select the **Employee** under **My Direct Reports**.

The screenshot displays the NEOGOV PE Perform dashboard. At the top, there is a navigation bar with the logo and a dropdown menu for 'Perform'. Below this is a secondary navigation bar with links for 'Employees', 'Performance Evaluations', 'Library', 'Positions', 'Administrative', 'Trainings', and 'Reports'. The main content area is divided into three sections: 'My Tasks', 'My Evaluations', and 'My Direct Reports'. The 'My Tasks' section features a summary table with five columns: 'Total' (1), 'Rating' (1), 'Approve And Sign' (0), 'Sign' (0), and an empty column. Below the table is a 'hide table' link. The 'My Evaluations' section is currently empty, displaying a message: 'Looks like you don't have any evaluations'. The 'My Direct Reports' section, highlighted with a red border, shows a card for 'Test Employee' (Test Position 1) with two sub-cards: '0' (with a checkmark icon) and '3' (with a document icon).

**NEOGOV** PE Perform

Employees Performance Evaluations Library Positions Administrative Trainings Reports

**My Tasks** [view all](#)

1 Total	1 Rating	0 Approve And Sign	0 Sign	
------------	-------------	-----------------------	-----------	--

hide table

**Task** For Employee

★ Rating For Test Employee's test evaluation on shift bids [Test Employee](#)

**My Evaluations**

Looks like you don't have any evaluations

**My Direct Reports**

Test Employee  
Test Position 1

0

3

Select the evaluation to be printed.

## Employee Details



Employee #: T123  
Email: Testemployee@douglasnv.us  
Position: Test Position 1  
Address:  
Phone:  
Active: Yes

Class Spec:  
Department: Human Resources  
Division:  
Online Access: Activated  
Start Date: 07/01/2017  
Separation Date:



## Performance Evaluations



Evaluation Name	Evaluation Type	Due Date	Status	Completion Date	Archived	Actions
Annual Evaluation Form - All Employees (due 10/01/2017)	Periodic	10/01/2017	Completed	08/21/2017	No	
Libby Test	Periodic	12/10/2017	Completed	08/01/2017	No	
test evaluation on shift bids	Probation	12/28/2017	Not Started		No	
Tst	Periodic	07/28/2017	Completed	08/01/2017	No	

## Development Plans



Development Plan Name	Begin Date	End Date	Actions
-----------------------	------------	----------	---------

Select **print preview**.

## Annual Evaluation Form - All Employees (due 10/01/2017)

Test Employee

 print preview

 reports

 copy evaluation

 print blank form

 pause evaluation

 archive evaluation

Select **print**.

Print Preview

Close

Print

### Test Employee

Annual Evaluation Form - All Employees (due 10/01/2017)

Due Date Sun, Oct 1, 2017

Direct Manager  
Kathy Jo Kidd

### General Information

**Position**

Test Position 1

**Division**

**Evaluation Type**

Periodic

**Department**

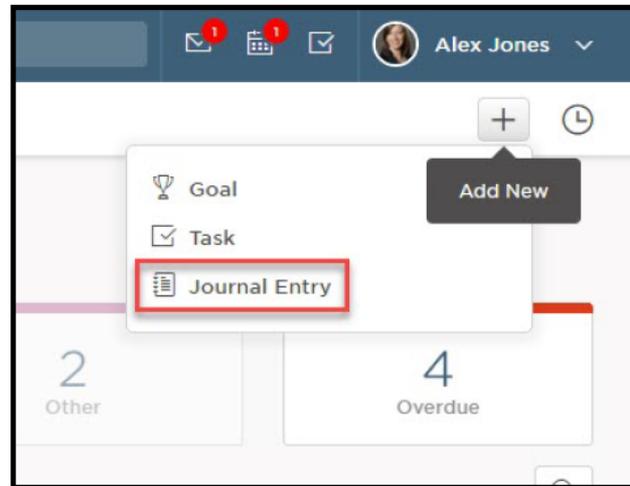
Human Resources

**Class Spec**

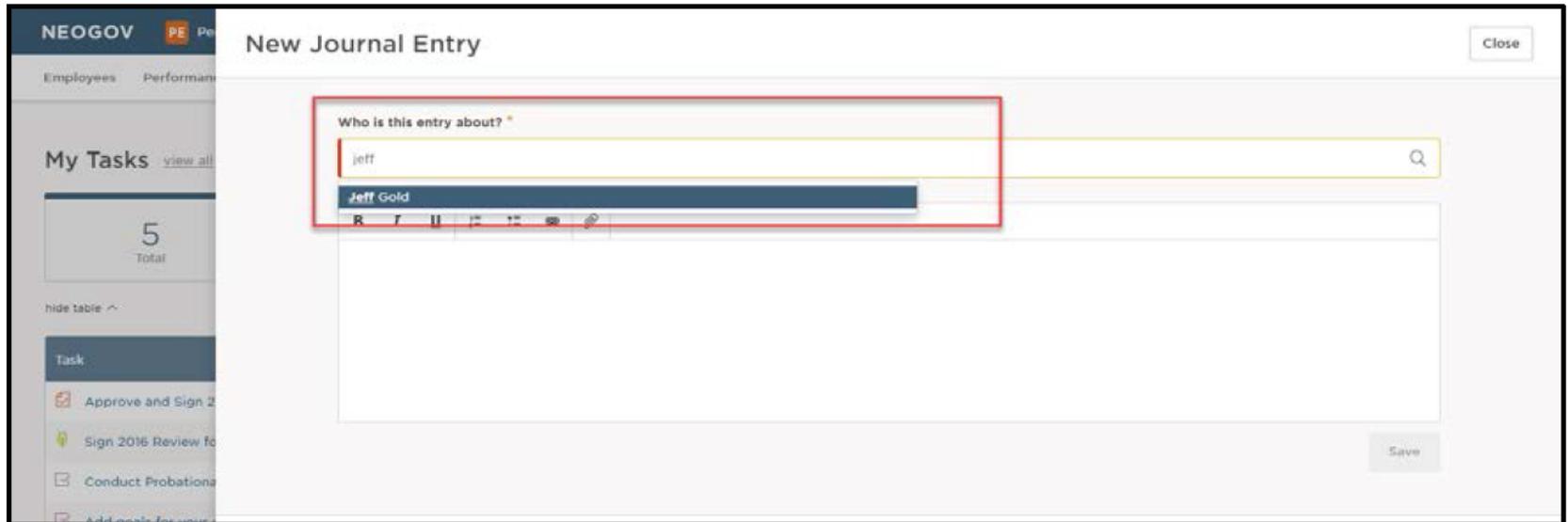
## Journal Entries

There are several ways you can add a Journal Entry: from your **Dashboard**, or from the **Employee Details Page**.

From your **Dashboard**, locate the **+** icon in the top right corner. This quick link menu will allow you to add a new **Goal**, **Task**, or **Journal Entry**. Select Journal Entry:



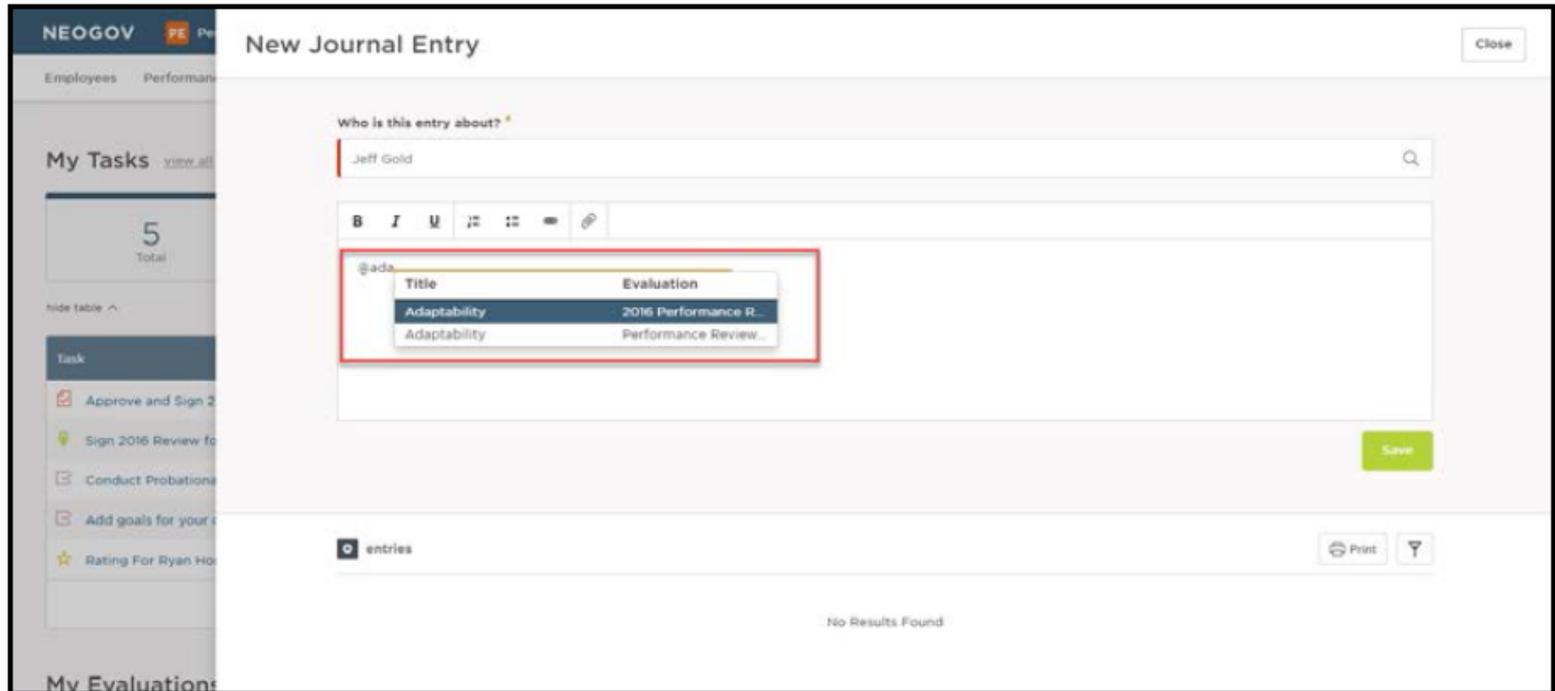
A fly-out of the **New Journal Entry** page will appear. Begin typing the name of your Direct Report in **Who is this entry about?:**



The screenshot shows the 'New Journal Entry' interface. On the left, there is a sidebar with the 'NEO GOV' logo, 'PE' status, and a 'My Tasks' section showing 5 total tasks. The main content area is titled 'New Journal Entry' and features a search box labeled 'Who is this entry about?'. The search box contains the text 'jeff' and a search icon. Below the search box, a dropdown menu displays 'Jeff Gold' as a suggestion. A 'Save' button is positioned at the bottom right of the form area.

**NOTE:** You may follow the same steps to create a Journal Entry for yourself, and type in your name.

You can tag a journal entry, e.g. a competency or goal name, to assist with searching for the entry later in an evaluation. To tag, enter the @ symbol and start typing a goal or competency:



The screenshot shows the 'New Journal Entry' form in the NEOGOV system. The form is titled 'New Journal Entry' and has a 'Close' button in the top right corner. The main content area is a text editor with a search bar at the top that contains 'Jeff Gold'. Below the search bar is a rich text editor with a toolbar containing icons for bold, italic, underline, bulleted list, numbered list, link, and unlink. The text editor contains '@ada' followed by a dropdown menu. The dropdown menu is highlighted with a red box and contains two options: 'Adaptability' and 'Performance Review...'. The 'Adaptability' option is selected. Below the text editor is a green 'Save' button. At the bottom of the form, there is a search bar with the text 'entries' and a 'Print' button. The text 'No Results Found' is displayed below the search bar.

Select from the list of competencies and/or goals that appears. Click **Save**.

Employees cannot be tagged in a journal entry. Only *Goals* and *Competencies* within the Evaluations associated to that employee can be tagged. However, you can *share* a journal entry with others!

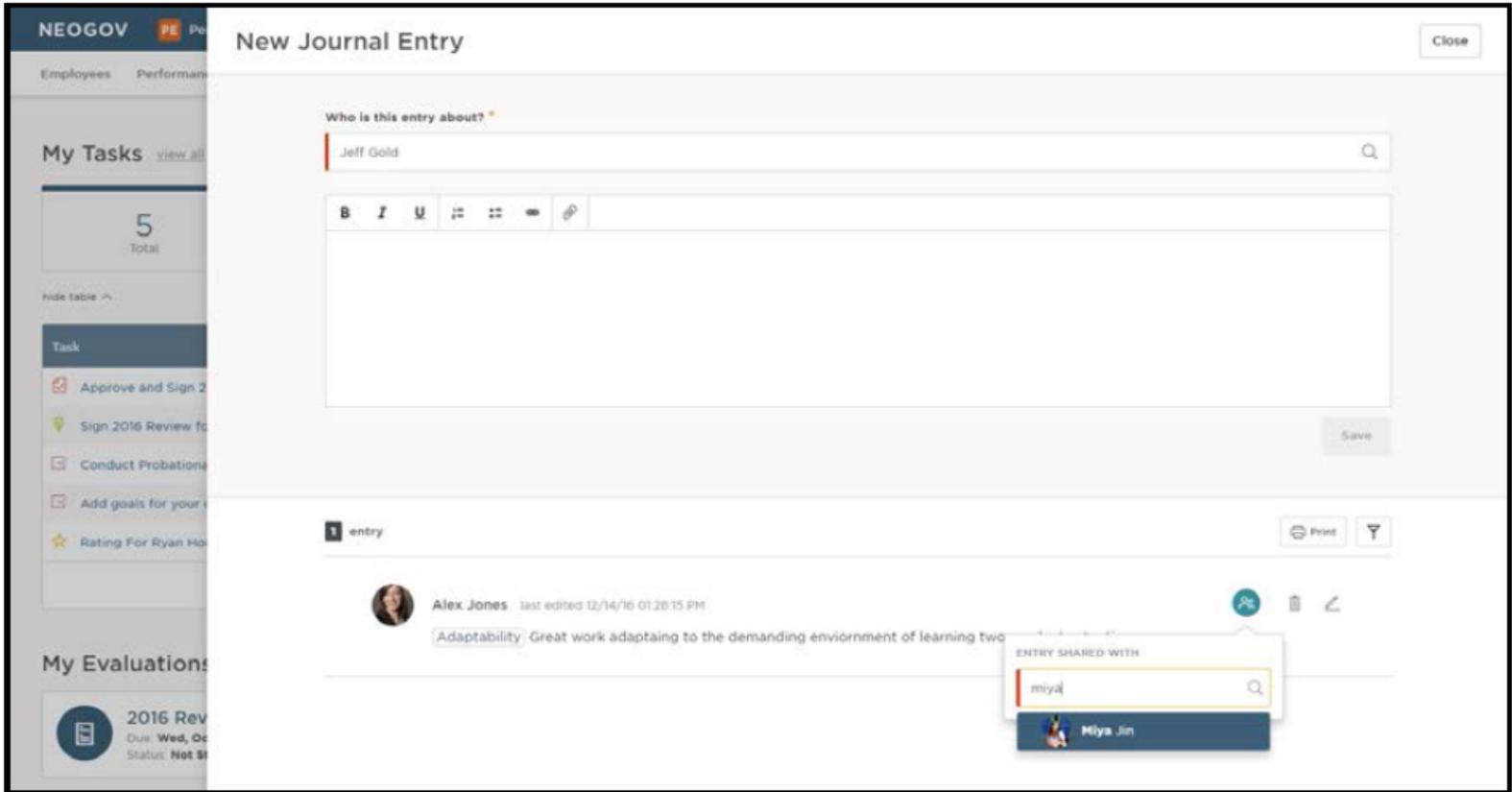
To **share** a journal entry, hover over the entry until three icons appear.



The blue people icon, , allows you to share your Journal entry.

**NOTE:** You can create and share journal entries for any employee, not just your direct reports.

Select the blue icon and enter the name of the person to share the journal entry with:



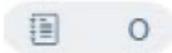
Once selected, they will immediately be able to view the shared entry.

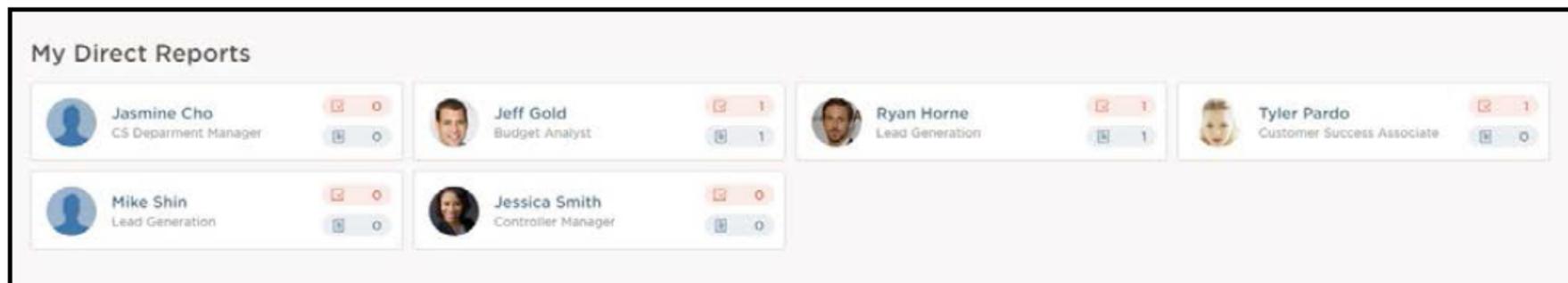
**REMEMBER:** Your direct report will *not* see the entry unless you *share* it with them.

To edit a journal entry you've created, click the pencil icon.

To delete a journal entry you've created, click the trash icon.

To add a journal entry for your direct reports via your Dashboard, navigate to the **My Direct Report's** section on your dashboard.

As mentioned above, select the blue journal icon,  :

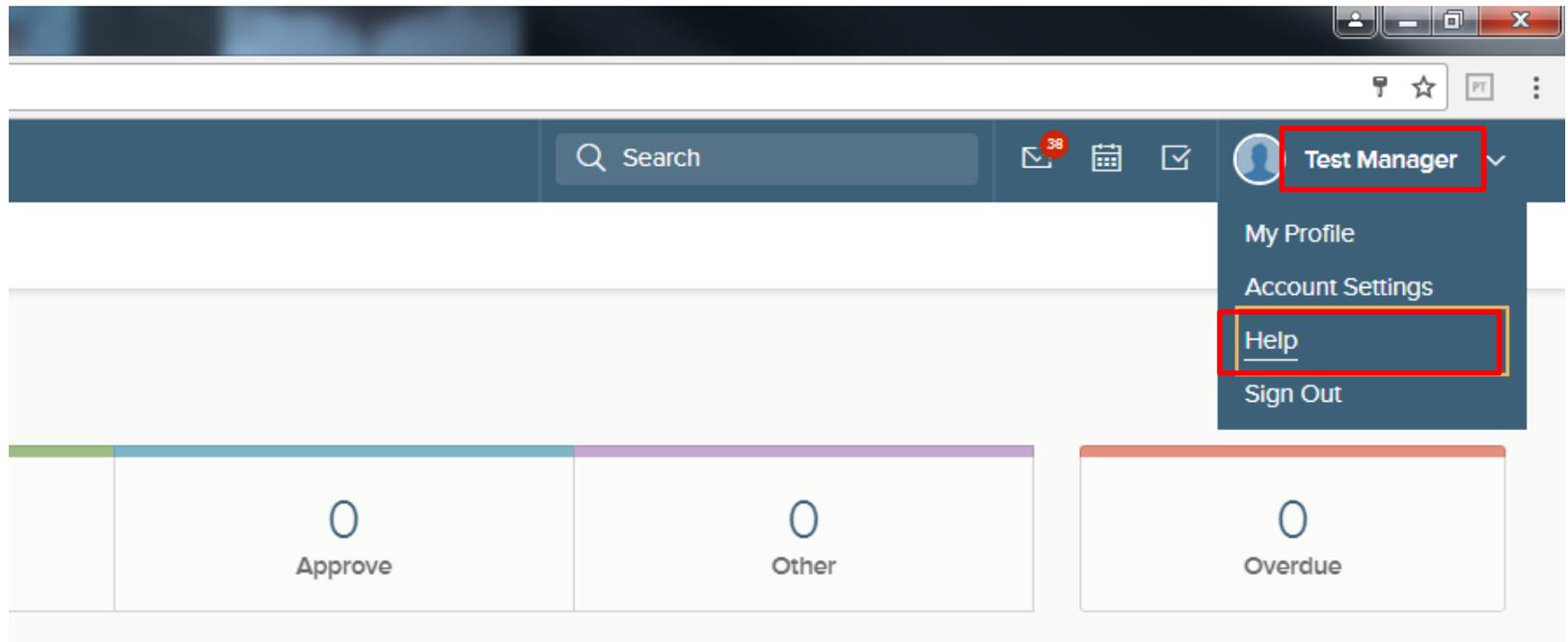


Upon selecting the journal icon, a fly-out will appear. Select **Click here to start a new entry...**:

Follow the same rules to add, tag or share a journal entry.

Finally, to add a journal entry via the Employee Details page, navigate to the desired employee's record. Click on the journal entry icon in the upper right:

Tutorials are available by clicking your name in the right-hand corner and selecting **Help**.



Select the PE tutorials that you would like to learn more about. The tutorials are short videos or articles explaining how to perform specific tasks.

## Knowledge Base

[← Customer Feedback for NEOGOV](#)

### Onboard →

 [ON: Completing Onboarding Tasks](#)

### All articles →

-  [PE - Welcome to the Dashboard!](#)
-  [PE: Create a Performance Evaluation](#)
-  [ON: Completing Onboarding Tasks](#)
-  [PE: Add Goals to Evaluation](#)
-  [PE: Add Goals and Start Evaluation](#)

[11 articles →](#)

### Video Tutorials →

-  [PE - Welcome to the Dashboard!](#)
-  [PE: Create a Performance Evaluation](#)
-  [PE: Add Goals to Evaluation](#)
-  [PE: Add Goals and Start Evaluation](#)
-  [PE: Completing Tasks in Perform](#)

[10 articles →](#)

# **EVALUATION CRITERIA**

The new evaluation criteria is based on the **VALUES** of Douglas County as defined in the **Strategic Plan**.

## VISION

A Community to match the scenery!

## MISSION

Working together with integrity and accountability, the Douglas County team is dedicated to providing essential and cost-effective public services fostering a safe, healthy, scenic, and vibrant community for the enjoyment of our residents and visitors.

## VALUES

**Integrity:** We demonstrate honest and ethical conduct through our actions.

**Accountability:** We accept responsibility for our actions.

**Customer Service:** We deliver efficient and effective service with an attitude of respect and fairness.

**Leadership:** We establish the tone and direction for success motivating and inspiring others to accomplish a shared vision.

**Communication:** We ensure open dialogue through proactive listening and sharing of information throughout the organization and the community.

**Teamwork:** We work together to achieve shared goals.

These **VALUES** are directly related to each individual employee's position, no matter the department or organization level they are employed.

# INTEGRITY

- We demonstrate honest and ethical conduct through our actions.

# **ACCOUNTABILITY**

- We accept responsibility for our actions.

# CUSTOMER SERVICE

- We deliver efficient and effective service with an attitude of respect and fairness.

# LEADERSHIP

- We establish the tone and direction for success; motivating and inspiring others to accomplish a shared vision.

# COMMUNICATION

- We ensure open dialogue through proactive listening and sharing of information throughout the organization and the community.

# TEAMWORK

- We work together to achieve shared goals.

**EFFECTIVE  
PERFORMANCE  
MANAGEMENT**

# What is Performance Management?

- Setting performance expectations
- Monitoring & coaching
- Evaluating performance

**A 12 month process NOT a 12<sup>th</sup> month process**

# What is Performance Management?



# What is Performance Management?

- Establishing performance criteria - What are the expectations?
- Improving performance – Get the most from your employees.
- Redirecting efforts – Employees may be working very hard, but on the wrong tasks; or the goals of the organization or department may have changed.
- Measuring progress – Establishing a means of clearly identifying if the employee is meeting expectations.
- Documentation – Provide feedback regarding progress towards established goals (both positive and negative). Regular documentation will help you write the evaluation.
- Identifying successors – Identifying viable candidates if an opportunity arises.
- Allocating wages - Ties performance to merit; Performance management assists in distinguishing different levels of achievement.

# Setting Performance Expectations

- **Provide clear direction of what is expected** (training, tools, timeline) to avoid setting them up for failure.
- **Setting goals - SMART**
  - Specific
  - Measurable
  - Attainable
  - Realistic
  - Time-based

# Setting Performance Expectations

**Job Duties and Tasks**



**Work Goals**



**Department Goals**



**County Strategic Goals**

# Monitoring, Coaching, Counseling and Reinforcing

- Performed throughout the evaluation cycle
- Track performance and help employees succeed
- Effective communication beginning at time of hire
- Document performance related conversations in writing throughout the evaluation period (Use Journal feature of NeoGov Perform)
- Coaching is an ongoing process that builds relationships

# Monitoring

## How to monitor performance:

- Informal observation
- Daily/weekly note taking
- Direct observation
- Specific work results
- Reports and records (attendance, safety, etc.)
- Commendations or constructive/critical comments received about an employee's work

# Coaching & Counseling

## Coaching and counseling are interrelated:

- Coaching is most effective to improve performance.
- Counseling is most effective to correct poor performance.
- Reinforcement is the glue that holds your coaching or counseling efforts together.

# Coaching & Counseling

## **Benefits of effective coaching include:**

- Employees know their job and what is expected.
- Provides opportunity for motivation to improve.
- Employees behave responsibly because they know what is expected of them.
- Goals are achieved.
- Trust and respect for the organization is built.

# Coaching & Counseling

## Effective coaches:

- Ensure employees are properly trained.
- Provide direction, feedback, and support.
- Provide tools and eliminate obstacles.
- Share information; make it available to employees.
- Lead by example.
- Listen.

# Let's T.A.L.K. Technique

Discussion starter for coaching, counseling, addressing performance or behavior problems, discipline, and when discussing evaluations.

- **T**ell it like you see it
- **A**sk for feedback
- **L**ead toward a solution
- **K**eep at it until it sticks

# Giving Reinforcement

- Builds confidence
- Establishes trust
- Inspires extra effort
- Encourages positive behaviors
- Focuses efforts
- Reduces turnover
- Builds stronger relationships

# Evaluating Performance

- End of evaluation cycle is beginning point for next period
- **Remember it is a 12 month process, not a 12<sup>th</sup> month process**

## Organization gains:

- Reduce costs. Motivated, high performers affect your “bottom line” whether monetarily or in the accomplishment of tasks.
- Minimize errors. Fewer errors mean less time redoing tasks and have the benefit of allowing you to concentrate on doing *your* job.
- Increase employee satisfaction and retention.
- Identify performance opportunities for training and development needs.

# Evaluating Performance

## The employee gains:

- A roadmap - They know where they are and where they must go in the future.
- Ambiguity is removed or at least reduced.
- Communication is open and two-way.
- Growth and personal development opportunities are identified.
- Personal satisfaction is enhanced.

# Evaluating Performance

## **The supervisor's responsibilities include:**

- Understanding the process.
- Communicating expectations and goals well in advance of the evaluation being written.
- Providing needed training and tools to the employee.
- Regularly monitoring and tracking performance.
- Documenting all aspects of performance and behavior.
- Providing feedback.
- Completing and delivering the evaluation.

# Evaluating Performance

## **Documents to review/help you write the evaluation:**

- Job description (essential functions of the job).
- Last performance evaluation.
- Any disciplinary action taken during the review period, including written and oral reprimands.
- Praise, compliments, and/or awards received in the review period.
- Complaints received during the review period.
- Training received during review period.
- Work and competency goals and their result.
- Any applicable policies or contracts (CBAs; master agreements).
- Coaching session notes.

# Evaluating Performance

- Everyone has **strengths**, as well as **opportunities for improvement**
- Everything you discuss, with exception of new goals, should sound very familiar to the employee – No surprises!
- **DO NOT INFLATE RATINGS**
  - If you have a majority of “**Meets Expectations**”, your employees are doing what is expected of them
  - “**Meets Expectations**” is a good rating and should be communicated as such

# Evaluating Performance

- **Be factual and accurate**
  - Make sure you can back up your rating with data
  - Focus on performance or behaviors and not personality, unless that is an issue
  - If personality is an issue, identify behaviors affecting the workplace
  - Identify the behavior; Don't attack the person

# Evaluating Performance

## **Schedule the evaluation meeting in advance:**

- Select a private location
- Be on time
- No interruptions
- Discuss specifics
- Be professional
- Focus on the future
- Obtain feedback

**Questions?**