



HR CONNECT AND COLLABORATE

PERFORMANCE
MANAGEMENT AND
EVALUATION

NOV. 19, 2024



AGENDA

- I Welcome and Introductions, Steven Lindquist**
- I Coaching and Mentoring, Michael Lambrecht**
- I Performance Management, Emma Grizzell**
- I Difficult Conversations, Aria Parr**
- I CEC Eligibility, Brooke Dahmen**
- I Other – Resources and Hot Topics, Andrew Ertle**

**This does not replace annual trainings*

COACHING & MENTORING

POLL: WHEN DOES PERFORMANCE MANAGEMENT START?

- I See Mentoring, Coaching and Corrective Action Guidelines
- I Behavior vs. Performance
- I Proactive vs. Reactive Management
- I Regular Meetings

PERFORMANCE MANAGEMENT

POLL: DO YOU SET FORMAL EXPECTATIONS WITH YOUR EMPLOYEES?

SETTING EXPECTATIONS

- I Setting expectations: new hires vs. existing employee
- I Individual expectations vs departmental expectations
- I Documenting expectations (email, official letters)
- I How to maintain expectations

PERFORMANCE MANAGEMENT

ENFORCING EXPECTATIONS

- I What is corrective action and when is it appropriate?
 - o Different tools available
- I Discuss scenarios outlined in the mentoring and coaching guidelines

PERFORMANCE EVALUATIONS

POLL: WHOM CAN I TALK TO ABOUT AN EMPLOYEE'S PERFORMANCE EVALUATION

STAFF EMPLOYEES

- I Intended goals of evaluation
- I Types of evaluations: 3-month, 6-month, annual
- I Employee Input Forms
- I What to include/exclude on an evaluation
- I How to handle a “Needs Improvement” rating
- I Setting Goals

DIFFICULT CONVERSATIONS

HOW TO HAVE A DIFFICULT CONVERSATION

- I Prepare for the meeting
- I Prepare a brief script (refer to sample script / tips document)
- I Document the meeting

ELIGIBILITY FOR CEC

WHAT IS REQUIRED

- I Evaluation on file
- I What is the cut off date for CEC eligibility?
- I How do you document exemplary merit?

CEC = Change in Employee Compensation

RESOURCES AND HOT TOPICS

- Do employees have to sign their evaluation?
- Can HR review evaluations prior to presenting to employees?
- Do employees need to have an evaluation when on leave?
- If an employee transfers to another department mid-year, who completes their evaluation?
- This review does not take the place of performance management training
- Evaluation forms and where to locate



PAYROLL

DEADLINES AND REMINDERS

- I Early Timesheet deadlines** for 24UI25 due to the Holiday - Timesheets are due to be submitted and approved by **noon on Monday, November 25th**
- I Early Timesheet deadlines** for 25UI01 due to the Holiday – Timesheets are due to be submitted and approved by **noon on Monday, December 23rd**
- I Set up a Proxy** – The next couple months have a lot of Holidays, please use the proxy function and communicate with your proxy if you need them to approve timesheets for you
- I No Special Checks** – Monday, November 25th, Monday December 23rd and Monday December 30th
- I Please process your EPAFs on time!!**



RECRUITMENT REMINDERS

I Background Checks:

- If a position requires a background check, it must be completed prior to an employee coming into Human Resources to fill out the I-9 and other onboarding paperwork and starting work. Please be sure background check requests are submitted timely, so the employee does not experience delays.
- We cannot expediate background checks. If there is a delay, we must wait for reporting parties to provide the information to the background check vendor. There is no exception to this process and start dates may need to be adjusted accordingly if needed.

I EPAFs:

- EPAFs should be requested promptly, especially terminations. There are processes on the payroll and benefits side that are delayed if the termination is not applied in time. This could result in an overpayment or the necessity for a special check to pay out leave.
- When initiating or requesting an EPAF, please provide accurate info. We have been seeing an influx of requests to fix EPAFs with the reason that EPAF initiators were provided inaccurate info.
- Employees cannot change employee classes (classified to exempt, student to staff/faculty, etc.) in the same pay period. A new job with a new employee class must be started at the beginning of a new pay period.



QUESTIONS?