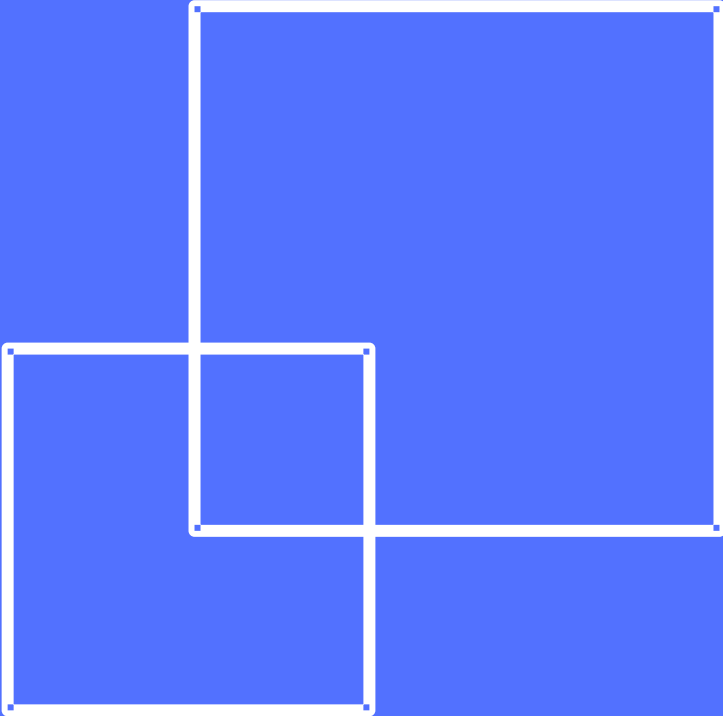




PERFORMANCE MANAGEMENT TRAINING

Spring 2026



WHAT TO EXPECT FROM THIS TRAINING

- **Performance Evaluation Basics**
- **How to Prepare for Performance Evaluations**
- **Best Practices & Common Errors**
- **Rating Criteria Guidelines**
- **Review of PageUp Evaluation System**
- **A Peek into the Future**





68% of employees

68% of employees say their employer's performance evaluation process negatively affects their work

81% of employees

81% of employees reported experiencing destructive feedback

78% of these employees described feedback so hurtful that they recalled it vividly, sometimes years later



14% of employees

Only 14% of employees say the reviews they receive inspire them to perform better

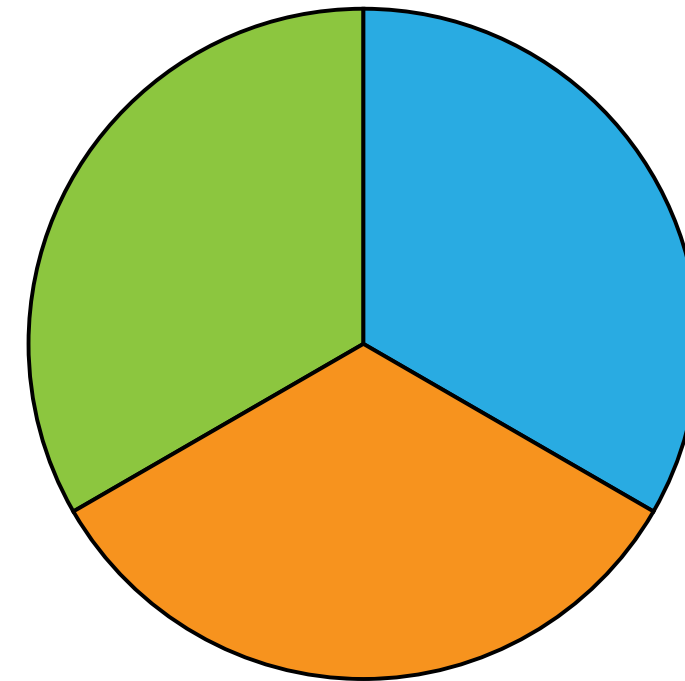
98% of HR professionals

98% of HR professionals don't believe their organization's current performance reviews provide relevant or accurate information about employee performance



Performance Evaluation Objectives

- Discuss job performance
- Set goals for professional growth
- Establish objectives for contributing to the department/university
- Discuss expectations & accomplishments
- Provide a measure for merit-based pay - more on this later



Focus on 3 equal parts

- Employee's Efforts - work activity, quality, quantity
- Employee's Outcomes - good or bad results, impact
- Employee's Behavior - conduct, actions, teamwork

Preparing for the Performance Evaluation



Employees

- Gather notes on goals, achievements, successes, and challenges during the entire review period
- Complete the self-evaluation (optional) and provide documentation of professional development completed during the year
 - May be required by supervisor or department
- Think about any support or training that would be helpful, goals for the next review period, and any changes to duties that may be different than job description



Supervisors

- Gather notes about the employee's goals, achievements, successes, and challenges during the entire review period
- Review the previous year's evaluation
- Review rating criteria
 - Prepare specific examples that demonstrate performance level
- Review the position description
 - Not for reclassification purposes, but alignment of responsibilities and expectations
 - Updates needed?

Get Comfortable with Goals

Goals should

- Align with the University's mission and strategy
- Tie into the goals of your department
- Be clear, specific, and easy to understand
- Be measurable
- Be challenging, but achievable
- Be accepted and recognized as important by those who will have to implement them
- Be framed in time, with clear beginning and end points
- Be written with input from the employee



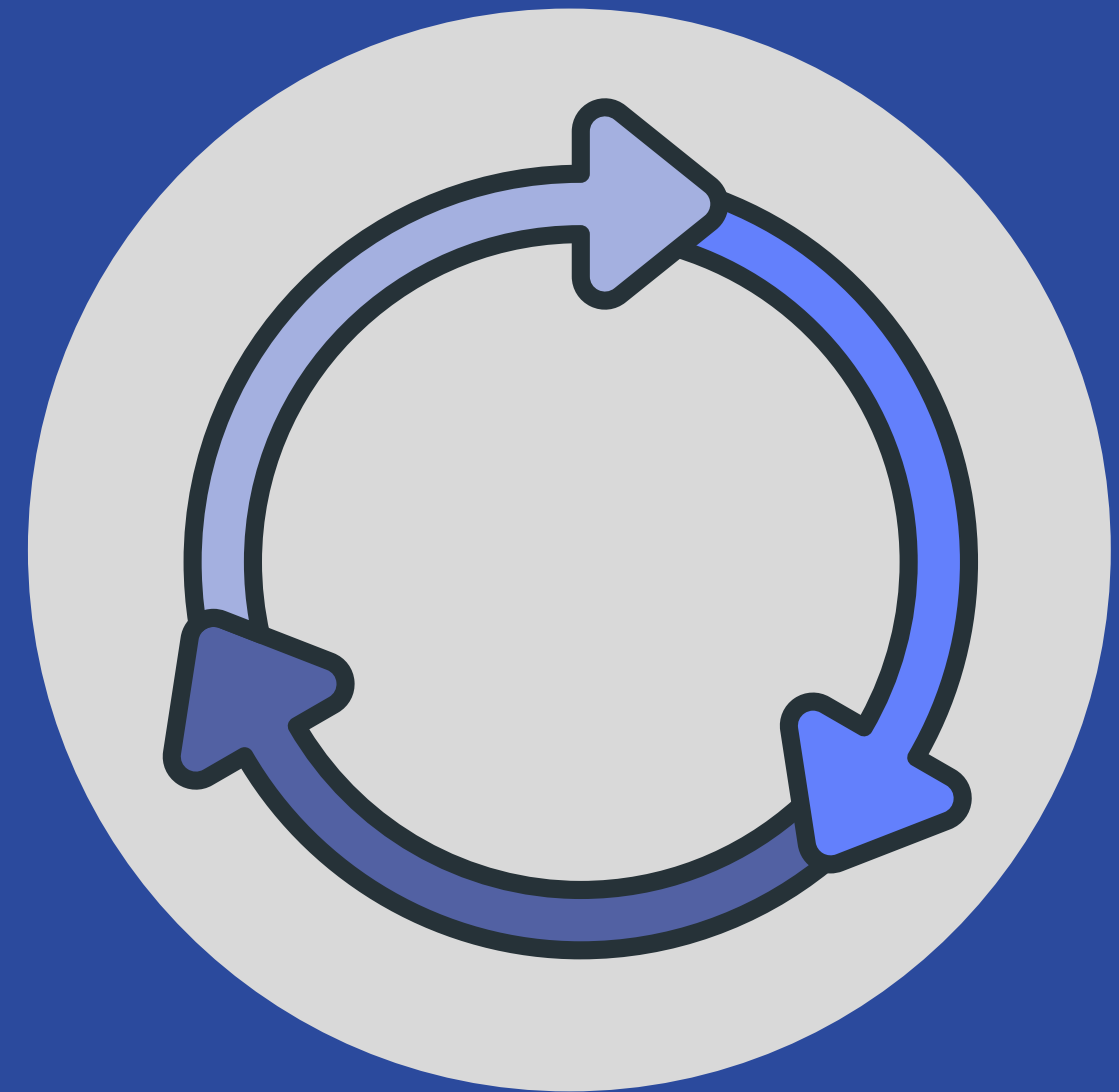
Guidelines and Best Practices

- Stay positive and constructive
- Stick with facts, not feelings
- Listen as much as you speak; ask questions that invoke participation
- Avoid generalizations and eliminate your own false notions
- Think big picture
- Focus on the feedback's value to the *recipient*, not on how it will make *you* feel
- Maintain mutual respect, especially when delivering negative feedback
- Try to end on a good note



Performance *Cycle*

Performance management should be continuous, ongoing, and always evolving. Feedback should be a comfortable way to share information between supervisor and employee, throughout the year.



What to Keep in Mind as a Supervisor

When & Where

- Well timed and in a welcoming, non-intimidating environment
- Nothing in the performance evaluation should be a surprise to the employee.



Forward Thinking

- Employees can't change the past, but can improve for the future
- Address concerns and provide advice for how to improve



Fair & Accurate

- Avoid any biases that could be discriminatory (tied to race, gender, age, health, or disability)
- Keep an employee portfolio throughout the year on all of your employees, noting accomplishments and challenges



Clear & Considerate

- Be clear and direct, making sure the employee understands the feedback
- Be considerate and supportive, especially when providing negative feedback

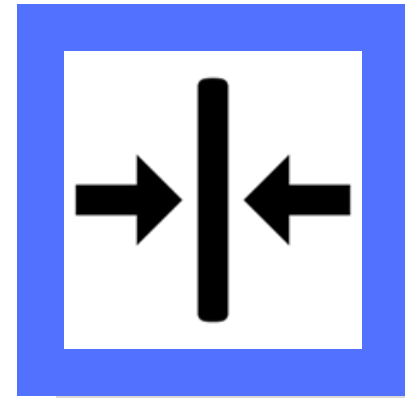


Common Errors



Horns Effect

Generalizing from one or two negative aspects of performance and becoming blind to the positive aspects



Central Tendency Effect

Employee is consistently rated at or near the midpoint of the scale regardless of the actual level of performance



Halo Effect

Over generalizing positively from one aspect of performance to all aspects of performance

in Evaluating Performance

Common Errors

Contrast Error

Tendency to compare an employee to other employees



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First-Impression Error

Tendency to initially judge “favorable” or “unfavorable,” which serves as basis for appraising future performance

Negative or Positive Leniency

Employee is rated too hard or too lenient based on the reviewer’s disposition



Recency Effect*

Tendency to give extra weight to what was seen recently and diminish the importance of observation throughout the entire review period

in Evaluating Performance

In Case of Conflict

- Listen to employee's concerns and allow them to vent
- Be conscious of nonverbal cues
- Think before you speak and deescalate
 - "I would agree with you on XYZ, but where I see things differently..."
- Is it possible something has been overlooked? Was the employee unfairly held accountable for areas outside of their control?
- Share responsibility when discussing things that have gone badly. What could have been done differently?
- Mutual understanding, not necessarily agreement



Concluding the Review Process

- **End the review meeting by asking for the employee's feedback**
 - **What can I do to improve as your supervisor?**
- **End on a positive note.**
 - **Express appreciation for the employee's contributions and reinforce the importance of their role to your team.**
- **Tell the employee they will receive an electronic copy of their review in PageUp**
 - **They will need to select "I acknowledge" button**
- **Final copy will be maintained in Human Resources**

Review Period Timeline

New this year:

- The performance review cycle will reflect on performance based on the fiscal year, July 1 - June 30
- Self-evaluations will be available in June
- Supervisors will be able to access their employees' evaluations starting July 1
- All annual reviews **must** be completed by **October 31**

Merit Pay:

- The 2025-2026 review period will provide a *baseline* for how merit pay will be distributed in the future. Merit pay will not be distributed in 2026 or 2027.



PageUp: Performance Evaluation Steps

- **Self-Evaluation - *optional* unless required by department**
 - Self rating
 - Comments
- **Supervisor Completes Evaluation**
 - Rating the employee's performance
 - Comments
- **One Up Manager Review**
 - Comments
- **Employee/Manager Discussion**
- **Employee Acknowledges Evaluation**
- **Evaluation Complete**



Performance Evaluation Metrics

- Dependability
- Job Knowledge
- Job Performance
- Communication/Interpersonal Skills
- Customer Service
- Adaptability
- Professional Development

Additional areas for Supervisors:

- Leadership
- Performance Management
- Effective and Efficient Use of Resources
- Institutional Contributions*

PageUp: Rating Scale

- **Outstanding***
- **Exceeds Expectations**
- **Meets Expectations**
- **Needs Improvement**
- **Unsatisfactory**
- **Non-Applicable**



A Deeper Look: Performance Rating Levels

Outstanding

Employee consistently goes above and beyond all performance expectations, makes extraordinary contributions to departmental and/or institutional goals. Significantly exceeds job requirements and demonstrates mastery in all facets of the position.

MTSU Specific Examples

- Develops innovative solutions that are adopted university-wide (e.g. streamlines a process saving significant time/resources across multiple departments)
- Leads cross-departmental initiatives that enhance MTSU's strategic priorities
- Receives external recognition that elevates MTSU's reputation
- Mentors colleagues, resulting in measurable team performance improvements
- Proactively identifies and resolves complex problems before they escalate
- Error rate consistently below 1% with exceptional attention to detail

A Deeper Look: Performance Rating Levels

Exceeds Expectations

Employee consistently surpasses performance expectations. Exceeds job requirements and demonstrates exceptional knowledge in all facets of the position. Performance is above the expected level in core functions and may show aptitude outside core areas.

MTSU Specific Examples

- Completes projects ahead of schedule while maintaining high quality standards
- Takes initiative to improve processes within their department
- Demonstrates strong decision-making ability when clarification isn't immediately available
- Actively pursues professional development and shares knowledge with team members
- Serves as reliable resource for colleagues on complex issues
- Handles unexpected challenges with composure and good judgement

A Deeper Look: Performance Rating Levels

Meets Expectations

Employee consistently meets standard job requirements. May exceed expectations in one or more identified metrics and/or have areas that need improvement or enhancement. Demonstrates reliability and follows through on commitments with minimal follow-up.

MTSU Specific Examples

- Completes assigned tasks on time and with acceptable quality
- Follows MTSU policies and procedures consistently
- Communicates effectively with supervisor and colleagues
- Maintains confidentiality and demonstrates support for University values
- Uses good judgement in solving routine problems
- Treats others with civility, courtesy, and consideration
- Participates in required training and professional development
- May excel in some areas while having room for growth

A Deeper Look: Performance Rating Levels

Needs Improvement

Employee performance needs to improve in one or more identified metrics in order to reach a standard level of performance. Completion of a Performance Improvement Plan should be considered per MTSU Policy 810.

MTSU Specific Examples

- Inconsistently meets deadlines or quality standards
- Requires frequent follow-up and guidance to complete tasks
- Occasionally demonstrates lack of support for University values
- Struggles to identify situations requiring confidentiality
- Needs to develop analytical skills necessary for the position
- Communication with colleagues or stakeholders needs improvement
- Has received specific feedback about performance gaps that haven't been addressed
- May excel in some areas but has significant deficiencies in core job functions

A Deeper Look: Performance Rating Levels

Unsatisfactory

Employee performance consistently fails to meet a standard level of performance. Substantial and sustained improvements in those identified metrics are required to achieve a standard level of performance. Completion of a Performance Improvement Plan should be considered per MTSU Policy 810.

MTSU Specific Examples

- Inconsistently Frequently fails to complete assigned tasks or meet deadlines
- Work product contains frequent errors requiring significant correction
- Does not exhibit courtesy and consideration toward others; demonstrates disrespectful or dismissive behavior
- Fails to follow MTSU policies and procedures despite repeated guidance
- Does not take responsibility for actions or mistakes
- Requires constant supervision and still fails to meet basic job requirements
- Performance issues negatively impact departmental operations or team morale
- Has not responded to previous coaching or feedback

Key Differentiators

Performance Level	Consistency	Scope of Impact	Need for Supervision	Innovation/Initiative
Outstanding	Exceptional, sustained	University-wide impact	Self-directed + guides others	Transforms processes/culture
Exceeds Expectations	Consistently above standard	Beyond position requirements	Minimal supervision needed	Proactive improvements
Meets Expectations	Reliable, consistent	Fulfills position requirements	Occasional guidance	Follows established practices
Needs Improvement	Inconsistent	Below standard in key areas	Frequent guidance required	Reactive, needs direction
Unsatisfactory	Consistently deficient	Negative impact on operations	Constant supervision ineffective	Unable to meet basic expectations

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There should be absolutely no surprises to the employee at their annual evaluation. Employees should always know where they stand.

Key Takeaways:

- New this year:
 - Review period July 1 - June 30
 - Reviews due October 31!
 - “Outstanding” rating & definition
 - Supervisor Only - “Institutional Contributions”
- Remember:
 - Be forward thinking
 - Be considerate
 - Be clear
 - Be fair
- Looking ahead:
 - Get comfortable with goals
 - Merit pay will count for 2026-2027 review period
 - Bye, PageUp. Hello, Oracle 2027!

QUESTIONS?

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