

# Employee Performance Management System (EPMS)

## Best Practices for Supervisors



This information provides supervisors with best practices of the University's performance management process. It is intended as a supplement and is not a replacement for training or University Policy FAST-HREO-221 – *Employee Performance Management System (EPMS)*. The performance management process serves as a management tool to formally document employee performance.

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**Why do we do performance evaluations?** Performance evaluations are one of the most important communication tools an organization can use. Performance evaluations benefit both the supervisor and the employee. It is a time to provide feedback, recognize quality performance and set expectations for future job performance. It is also a time to have candid conversations about performance that is lacking and how performance can be improved. Ongoing performance discussions can assist in avoiding serious problems in the future. We have created this Best Practices guide to assist supervisors in this essential process.

Consider these “ground rules” to ensure that information is similar no matter which supervisor is writing the evaluation and to ensure the accuracy of data and limiting possible bias.

### **Preparing for performance evaluation review meeting with the employee:**

1. Ask the employee to perform a self-evaluation of their performance prior to meeting with their supervisor. Alternatively, ask the employee to provide a list of accomplishments or a brief narrative about their performance. This is optional for each supervisor. ***The self-evaluation is NOT meant to be a substitute for the supervisor's evaluation, but to allow for reflection on one's own performance and to create a collaborative effort between the employee and the supervisor to improve/maintain high performance.***
2. Review the employee's last performance evaluation. Note goals from the previous evaluation period.
3. Review the employee's file and speak with other managers and employees who interface with this person. In other words, gather data about performance.
4. Schedule a meeting time and date with the employee.

### **Completing the Performance Evaluations:**

1. Use only factual information and avoid opinion or perception.
2. For each comment section, examples of employee behavior should be provided.
3. Fill out the necessary forms for this employee's appraisal. Note which areas you want to address in the appraisal interview with the employee.

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**The Performance Appraisal Policy** provides for three levels of performance to rate job functions, objectives, and overall performance:

1. **Exceptional** – work that exceeds the criteria of the job function throughout the rating period.
2. **Successful** – work that meets the criteria of the job function.
3. **Unsuccessful** – work that fails to meet the criteria of the job function.

**NOTE:** a rating of "Unsuccessful" *requires* the approval of the office of Human Resources and Equal Opportunity. If there are performance issues, supervisors should be communicating with HREO right away to allow HREO to assist with improving the employee's performance. This may include issuing a Notice of Substandard Performance to the employee when necessary.

**Performance Characteristics** will not be rated by the three levels of the Performance Appraisal Policy, but will be given a rating of pass or fail.

1. **Pass** – meets requirements.
  2. **Fails** – fails to meet requirements.
4. For the overall rating:
- a. There should be items/examples listed in the "Accomplishments" tab.
  - b. There should always be at least one item listed in the "Areas Needing Improvement" tab
    - i. No one is perfect and we all have areas to improve – This supports our culture of continuous improvement.
  - c. There should always be at least one item listed in the "Steps to Improve Present and Future Performance."
    - i. This speaks to a culture of continuous improvement and should align with aspirational goals for the employee and the department.
5. For an employee to receive an Exceptional rating in any category, there **must** be a justification provided with one or more examples of the exceptional performance.
6. Reviews must be complete and shared with the employee before the deadline.
7. **Don't forget** to instruct the employee to acknowledge their evaluation in the People Admin System as the last required step to complete the EPMS process.

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### Performance Appraisal One-on-One Meeting:

To provide the best feedback to the employee during the performance appraisal one-on-one meeting, consider the following:

1. **Be direct and specific.** Use examples to show where the employee has room for improvement and where the employee exceeds expectations, such as, “The expectation is zero accidents, and you have not had any accidents this year.”
2. **Do not be personal; always compare the performance to the standard.** For example, instead of saying, “You are too slow on the production line,” say, the “expectations are ten units per hour, and currently you are at eight units.” Focus on observable behaviors.
3. **Remember, it is a development opportunity.** As a result, encourage the employee to talk. Understand what the employee feels he/she does well and what he/she thinks they need to improve. Refer to the employee’s self-evaluation when applicable.
4. **Thank the employee and avoid criticism.** Instead of the interview being a list of things the employee doesn’t do well (which may give the feeling of criticizing), thank the employee for what the employee does well, and work on action plans together to fix anything the employee isn’t doing well. Think of it as a team effort to get the performance to the standard it needs to be.

### The Result of a Completed Performance Evaluation:

1. The employee now has written, documented feedback on his or her performance.
2. The organization has documented information on low performance, in case the employee eventually needs to be dismissed.
3. The employee has performed well and may require an updated Position Description to reflect his/her additional duties.
4. The employee has performed well and could be considered for promotion.
5. Performance is not up to expectations, so an improvement plan should be put into place.
6. The employee hasn’t done well, improvement plans have not worked (the employee has been warned before), and the employee should be dismissed.

Should you have any questions, or require any assistance with the EPMS, please contact Jennifer Rega @ 843-349-2658 / [jrega@coastal.edu](mailto:jrega@coastal.edu) or Lori Cox @ 843-349-6496 / [lori1@coastal.edu](mailto:lori1@coastal.edu) in the Office of Human Resources and Equal Opportunity.