**Performance Evaluations for Managers Training-20230614\_100058-Meeting Recording**

June 14, 2023, 4:01PM

1h 28m 59s

 **Kaley Espindola** started transcription

 **Kaley Espindola** 0:07  
All right.  
I think we'll go ahead and kick it off.  
Everybody is ready.  
Carolyn and I are ready.  
Welcome to the dynamic duo of Carolyn Taylor and Kylie Espindola presenting performance evaluations for managers.

 **Shantelle Romero** joined the meeting

 **Daniel Segal** joined the meeting

 **Kaley Espindola** 0:22  
I think some people have you been here for a little bit and we kind of revamped this training is the training that's existed previously, but I'm excited to kind of walk through some some slight changes that we've made this year, some best practices and kind of just share our knowledge with you and be able to really answer questions as they come up.  
So quick introduction.  
I'm Kaylee espindola.  
I'm the talent acquisition and employee relations and compensation director right now, interim director for all three of those, but I've been with UCCS since 2021, so I'm almost at my two year mark right now, very exciting and I'll have jerilyn introduce yourself and then we'll kind of get started.

 **Maja Krakowiak** joined the meeting

 **Jenna Press** joined the meeting

 **Jerilyn Taylor** 0:59  
Good morning.  
I am jerilyn Taylor.  
I'm the director of HR operations, so in my group is payroll data and some of those other things I have been here a little over a year and and performance management is not typically under my umbrella.  
That's usually kaley's wheelhouse, but we thought it would be really fun to be able to tag team this training, so here I am.  
But as we'll explain in a little bit, most questions are still going to go to Kaley.  
I will be monitoring the chat, so if you guys have questions as we go through, we'll look at the chat.

 **Frederick, Kristine** joined the meeting

 **Jerilyn Taylor** 1:38  
If you want to unmute yourself and ask questions, you're more than welcome to, but just know that we're looking at the chat as well as we go through this.

 **Kaley Espindola** 1:47  
Perfect.  
So this is the first one we're doing virtual.

 **Robert Sackett** joined the meeting

 **Kaley Espindola** 1:50  
The last one we had in person, and it was a nice time to like kind of go around and introduce each other and and hear where everybody's working at.  
I think we have kind of a big group to do that right now.  
So we'll just kind of jump into it, but we would love for if you want to be on and this isn't interactive training as much as jerilyn.  
And I love to chat and talk, and we would love to have you guys interact.  
So if you come on screen that would be awesome.  
Throw your notes into chat.  
We'll kind of read them out.  
We want this to be as kind of interactive.  
So you're you're getting some real life experience and also hearing from other people's kind of their perspectives.  
When we get to the rating scale and all of that good stuff, so jumping in, so just a little virtual, I think everybody's been doing this for a few years, so not as needed.  
But feel free to post questions in the chat.  
Engaged in the learning experience.  
Ask questions.  
You know, this was a really good dialogue in the last one.  
We actually got really tight on time just because those really good discussion around some of these key topics.  
So this is one for a little bit of participation myth or reality.  
People hate performance appraisals.  
We think that's a myth.  
Or do we think that's reality?  
And my call on people alright.

 **Jerilyn Taylor** 3:03  
Ohh.

 **Marcus Davis** 3:04  
It's reality.

 **Kaley Espindola** 3:09  
They a good mix, so I'm gonna say it's kind of a partial myth.  
I feel like that's a very HR.  
It depends, but it's a partial myth.  
You know, people, especially millennials, they do want feedback now a whole nother conversation is how they handle that feedback.  
But we do like to give it they wanna know where people stand.  
And it's a really great opportunity to have these really good conversations.  
So I think one thing we're going to talk a lot about is the annual part of an appraisal versus more frequent check-ins, better conversation, and seeing how you can use a document like a required performance eval that has to be turned in once a year and make it a more useful tool for employees throughout the year.  
So what will discuss?  
We're gonna do some requirements to complete the performance evaluations, just the nitty gritty.  
Here's what we need.  
Here's the forms.  
Here's the process.  
We're since spend some time on the how to set a smart goal and smarter as the newer phrase for that.  
But smart goals, because we're doing the whole cycle and then how to avoid some reading errors.  
And really, we had really good discussion on this rating calibration, which may be a new term, but I think it'll be a really good thing.  
We do have different types of employees, employment types at UCCS, so we have our university staff, which are kind of on one system.  
We have faculty both 12 and 9, and then we have classified staff and classified staff are a very nuanced process, different things.  
So we will be following up.  
If you have classified staff that you need to do performance evals for, will follow up with you directly and and have those conversations as there's been some updates in that process too.  
So today we're focusing on faculty and staff.  
This is a very quick slide.  
Just the difference between overall performance management versus the actual evaluation, you know, performance management is the entire process, right?  
This is the entire life cycle of an employee that we're having conversations throughout the year future oriented.  
We want to plan and set goals.  
We're doing all that ongoing progressive steps.  
This is like when I see the circle.  
This is the management cycle performance evaluation.  
It happens once a year.  
It's kind of that snapshot in time.  
Looking back, how did the year go?  
I do like the UCCS kind of combines this, which is very common, but it's going to do the eval on how you did last year.  
Talk about that and then also do some of the future planning and then we wanna use this tool to continue to have that conversation for the rest of the year.  
Any questions on the process like management versus like a one snapshot evaluation, no good, alright, shout him out if you got.  
So why do they matter?  
You know, this is a really key thing.  
They are important.  
Sometimes they're the bane of our existence.  
Sometimes they're the best opportunity to have a conversation with a an employee, but you know, it's really important to make sure that everyone's informed.  
There's open conversations throughout the year.  
Make this process significantly easier.  
You'll hear us say that throughout the presentation a couple of times we're going to do some future for the planning of.  
Planning for the future and get you know, there's a lot of things that are are happening at the university and departments at the Chancellor level, all the things and it can be really exciting to to sign us up those plans and actually will ease some of the uncertainty for our employees if we can kind of outline some steps for them and what their next goals look like for the upcoming year.  
And then employees do want to know how they're doing.  
And I feel like I saw that.  
Maybe in the chat a little bit of if an employee knows where they're where they stand, what they can do, very clear expectations, they're going to be hopefully much better performer because they have very clear expectations on where they're moving.  
Trailer Jeremy.

 **Jerilyn Taylor** 6:43  
Not right.  
So everybody that had that is part of the performance evaluation process has a role to play.  
Nobody's a passive participant in this process, so the he's going to talk about a couple of the steps as we go through the timeline of what a performance appraisal looks like.  
But for the employee, they have some work to do.  
First of all, of course they're doing the work every day, right?  
They're the ones who are getting the daily tasks done. Umm.  
They are responsible for making sure they are doing the things that are in their job duty or their job descriptions, you know, and it's really helpful.

 **Kaley Espindola** 7:18  
No.

 **Jerilyn Taylor** 7:26  
This was a tip that I got very early on in my career.  
Keep a log of the projects that you as an employee because you have a dual role.  
If you're a supervisor, you're also an employee and this is something to encourage your staff to do as well.  
Keep a log or a file folder of the work that they've done.  
The projects that they've completed, the kudos and feedback they've received maybe from others in the department or from other departments, I created kind of a portfolio of my work when I was a brand new into HR, I called it my Me book.  
So I had at the end of the year demonstrations of the work that I had completed to help my supervisor be able to complete my performance evaluation efficiently and accurately.  
So I'd encourage you, if you don't have a portfolio of your own work as an employee, to do that, keep a log of what you've accomplished in the year, but also encourage your teams to do that as well.  
If you're faculty and you're doing faculty evaluations, faculty also have specific things that they're responsible for gathering.  
You can see that on the slide there FCQ they're chair peer observations feedback.  
Their canvas shells, things like that.  
Employees are also responsible for reviewing their job description, knowing what is in their job and for knowing what their goals are for the year and monitoring their progress to those goals.  
We will take a look at the self evaluation here in the next minute or two.  
We've added some things to the self evaluation process, but the employees responsible for completing that self evaluation and the employees also responsible to be open to feedback, Kaley alluded to that earlier.  
You know, some people say they love feedback and then maybe they don't respond so well.  
But that's part of the employees role is to receive the feedback, to understand the feedback and to work at improving through that feedback.  
So let's take a look at what a self evaluation looks like.  
I have these teeny tiny controls on my screen to see if I can work them.  
Yay, it's working.  
There we go.  
Uh, so we added a few things on to the employee self evaluation for this year.  
I went in to make one small change to the valuation, but kaley's giggling cuz she knows I just can't leave well enough alone.  
I couldn't just do the one small change.  
I thought if we're going to update the form, let's actually make the form more useful as part of this process, Kaley suggests that we add an employee self evaluation.  
So now you'll see when your employees turn in their self evaluation, they will actually have given themselves a rating of how they feel that they did all year.  
So let's take some time to kind of think about that.  
So if an employee rates higher than you would have or rates lower than you would have, what do you think you would do with that as a supervisor?  
What are you doing with that information when you see that come in?  
Can either unmute yourself, shouted out, or throw it into the chat.

 **Ida Dilwood** 10:44  
Give me a hi.

 **Kaley Espindola** 10:44  
I don't.

 **Ida Dilwood** 10:45  
Ida Dilwood uh disability services.  
When I saw this, I actually don't like it when I don't like it for myself as an employee to have to rate it, because if in the past I have raided myself higher and I've gotten lower and then I've had that discussion and I still disagreed with my supervisor that I should have gotten a higher rating than they had given me.  
I also think it's difficult because I have had employees in the past that have thought that they should have had a higher reading and then we've had very awkward and difficult conversations until the next go around them being upset that, you know, maybe they received a meeting expectation because they were doing their job well, but they were just doing their job.  
They weren't exceeding expectations.  
And they they weren't at the outstanding level.  
So there is like a lot of animosity between, I think that conversation.  
I've also heard other people saying that they're going to skip that and not rate themselves ohm, so I I don't know.  
I mean, that's just my opinion.  
I'm not sure how it's gonna go with my employees this go around, but I suspect there are some employees that think they do better than what they have shown throughout the year and it's already a difficult conversation when you have to give them a a lower rating.

 **Jerilyn Taylor** 12:17  
Umm.

 **Kaley Espindola** 12:22  
Umm.

 **Ida Dilwood** 12:27  
So just my two cents.

 **Jerilyn Taylor** 12:27  
Yep, sure.  
Thank you for that.  
There's a couple of techniques to be able to have these conversations, and we're going to go through some tools that you have in order to show examples of what different ratings look like.  
My practice as a supervisor has been before I even start performance evaluation conversations.  
Before I send this out to employees, I have a conversation about what the ratings look like.  
A3 is you are doing your job well, just like that.  
That definition says you're fully performing the expectations and you the exceed them, and if five is just like it says in the definition, you are far exceeding performance expectations, you're going above and beyond your job duties, and we'll talk about some examples for that.  
So I am level setting with my staff before we even have those conversations.  
So they can hear from me what I think those ratings are, and I think it's a great conversation to have.  
If somebody rates themselves higher than you would.  
Why?  
What is the difference and how next year can they work to get their rating from their supervisor of five as well?  
So yeah, there's some cultural change in here.  
This is going to feel a little bit different in here.  
Umm.  
Let's see, yeah.

 **Kaley Espindola** 13:49  
We have one thing to add to and and I I think you hit the nail on the head were this I think really helps supervisors approaching and preparing for the conversation that they're about to have is that employee is still coming in thinking there are five and then at the end of the conversation, they're not getting that score.  
So they're already there, and this kind of helps you, maybe even understand where they're coming from of like, OK, so they're thinking they're five.  
Here's where I wanna have this conversation.  
Here's some things I want to pull up.  
It'll help you prepare for that conversation a little bit better, and I don't think it changes the employees perception of themselves.  
And actually what we've seen when employees do do a self evaluation first is a lot of them will actually score them a little bit lower, right?  
They're a little bit too critical of themselves and say I guess that, you know, maybe a three, maybe a two am I actually meeting my goals and I some people will hardly be too hard on themselves.  
And so that's a really good conversation, but it helps you level set when you're about to have your one on one conversation with the employee knowing where their head is already at.  
So I would I would encourage you to, if you get a one on one or your the selfie vowels back and this isn't umm it's it's just a good opportunity to for them to say you know what I think I've met to this and even if I haven't met all my goals.  
But here's why and it'll give them an opportunity to explain some things too.  
Self evaluation is not optional.  
Great questions.

 **Jerilyn Taylor** 15:11  
All right.  
So the next section of the self evaluation is the goal section and this is a really critical portion where the employee is listing their goals from this previous year and then also talking about the outcomes of accomplishing the goals.  
This is a chance for you to see how the employee thinks they did on their goals, and this might be part of the discussion of why you rated them A3 and they rated themselves A5.  
Did they meet all their goals?  
Did they exceed their goals?  
Did they meet some of them and not others?  
Then the next step is looking at the goals for the upcoming year.  
So this is where the employee starts drafting.  
What do they think they want to work on for this next year?  
These aren't set in stone.  
This is going to be something that you and your employer likely to go back and forth on a couple of times to make sure that the goals are appropriate and that will get, you know, drafted as you go through this process and we'll talk about goal setting in the next few slides.  
Then there's some questions for employees to answer.  
These have not changed.  
These stayed the same this year, and you can take a look at those.  
I'm sure you guys are familiar with them.  
If you have done the evaluations before, but again this is a chance for the employee to really justify if they rated themselves A5.  
This is where they're justifying This is why I'm A5.  
These are the stretch goals that I made.  
These are where I really exceeded.  
These are the extra job duties that I took on.  
These are the procedures that I wrote.  
This is the training that I delivered.  
These are the committees that I was on that are above and beyond my regular job duties, so maybe that's one thing that you can do if you see an employee that rates A5 and then in the assessment of their role, they really don't have much feedback, ask them for some more feedback.  
Give me some examples of where you went above and beyond your job.  
Tell me this is your chance to brag about yourself.  
Employee, don't be humbled.  
Don't hesitate.  
Give yourself those kudos.  
Make sure that I as your supervisor, know what you've been working on so hard this year.  
I see a question in the chat.  
These are steps for staff, not faculty room.  
Yes, this is correct.  
This is all for university staff.  
This is the university staff form.  
Thank you for that clarification.  
I just kind of jumped right in there.  
And there's also a section for employee comments and feedback.  
So if the employee had barriers to getting things done, there were many vacancies in the department.  
They I had some extenuating circumstances that needed to be considered in this evaluation.  
This is a chance for the employees to write in there.  
Whatever it is that they feel is important, that you as their supervisor, no.  
Then, of course, we've alluded to this already, there is the role of the supervisor.  
We hope that before this evaluation process even starts, supervisors have identified objectives, expectations and goals for their staff.  
That's part of that performance management process that Kaylee was talking about earlier.  
So that's outside the formal performance evaluation process, but it's good practice for every supervisor to meet with their employees on a regular basis, talking about what their goals are, the progress to their goals, what are the expectations for the employee for the team, and that they're meeting formally and informally throughout the year to program to talk about those items.  
The supervisor should be reviewing the employee self evaluation and the comments and those evaluation and thinking about when they have the meeting with the employee.  
How are they going to approach differences in opinion on those comments, on progress, on the ratings typewriter needs to hold the face to face meeting.  
It's not a here's your performance evaluation and an email.  
Let me know if you have any questions.  
This is really valuable time to continue farming that relationship with that with that employee.  
Have an open discussion that dialogue questions that the employee may have and really being able to talk back and forth about how the year has gone and how the year should go for the next year.  
And then, of course, please, please, please turn in the rating form to HR with the attached comments.  
That's a small part of the whole entire process, but it really makes HR's life easy when we don't have to chase down forms as we go through the merit increase process.

 **Kaley Espindola** 19:57  
And I will clarify cause we did get a question in the last one too.  
It's been inconsistent since I've been here of sometimes we only get a rating sheet and sometimes we get a whole packet and we would love the whole packet should have all the comments, all the stuff we we really need that and from an employee relations standpoint it is you know when we have to go back and pull a couple things out and say has it been discussed before previously if we get a rating sheet with zero comments and A5 that makes it a lot harder to to have those conversations.  
So please turn in the whole packet.  
Thank you.

 **Jerilyn Taylor** 20:27  
And I see a question in the chat.  
Is there a tutorial or training for employees in the self evaluation?  
Or should we be explaining these to our employees?  
We do not have a training, nor do I expect we're going to be able to have enough time to be able to deliver a training to employees about this type of thing.  
Uh, so yes, I think it's a great conversation for you as the supervisor to have with your team on what the expectations are regarding the self evaluation and how you would like them to proceed.  
All right.  
To clarify another question, to clarify, you just need the rating sheet to include comments or do you need both the rating sheet and the self evaluation?

 **Kaley Espindola** 21:07  
All packet we would love the whole packet.  
I know, Kara.  
I think faculty slightly are different because of how the numerical calculations happen, and then it's on the ratings form.  
And then there's comments there.  
This came up a little bit and the the previous training too, so that one if that's only the form because you can't send the whole don't know they call it a root brick or the whole spreadsheet calculation thing, that's OK.  
But for university staff, please are in the entire packet.  
Umm do you need so that's for new staff.  
I have a feeling some will be uncomfortable with that.  
With what part?  
Sorry, Kara.

 **Kara Carragher** 21:51  
I just mean that's a new process for staff.  
So in the past we have not submitted self evaluations and staff know that.  
So I have a feeling this time they may feel uncomfortable with what they actually write on their self evaluation, knowing that it's going to be as an official part of their file.

 **Kaley Espindola** 22:07  
Interesting.

 **Kara Carragher** 22:08  
Oh yeah.

 **Kaley Espindola** 22:11  
Noted, I will take that.  
Yeah, that's an interesting.  
We should have the entire document as part of their file.  
It's it.  
That's what we should have been doing this whole time, and I think it was even last year there was, I think I I made billions, said it.  
I think I was told that we just get rating sheet and then I was like, well we have some here and some here and the legal weight in and said Nope whole thing whole thing should be included in that.

 **Ida Dilwood** 22:29  
They come down.

 **Kara Carragher** 22:32  
OK, sounds good.

 **Kaley Espindola** 22:32  
So that's good to highlight.

 **Ida Dilwood** 22:34  
Yeah, we've never ever given anything but the rating sheet for 20.

 **Kaley Espindola** 22:34  
Thank you.

 **Ida Dilwood** 22:40  
I mean, I've been on campus 20 some years.  
That is very new and I don't think that's ever been like given out to to supervisors that we were supposed to do anything different.

 **Jerilyn Taylor** 22:46  
Yep.

 **Ida Dilwood** 22:54  
HR has always said don't send anything except the rating sheet which gives A1 liner comment that you pull from the larger evaluation that I've done.

 **Kaley Espindola** 23:02  
Yeah.

 **Ida Dilwood** 23:07  
I mean, I keep the self evaluations, we've done self evaluations for years. But I agree with Kara.

 **Kaley Espindola** 23:13  
Hmm.

 **Ida Dilwood** 23:16  
I don't you know if staff are gonna be OK with that, but if that's new then it's new, but.

 **Kara Carragher** 23:21  
I think at the very least that, yeah, I think Embassy HR should at least communicate that because I have not understood that as part of the process.

 **Kaley Espindola** 23:24  
We highlighted, yeah.

 **Kara Carragher** 23:29  
And I read all of those emails.

 **Kaley Espindola** 23:31  
That Yep, highlight.

 **Kara Carragher** 23:31  
I'm assuming our staff probably don't, so that should probably be communicated to them from campus HR.

 **Kaley Espindola** 23:37  
Perfect.

 **Kara Carragher** 23:38  
Thank you.

 **Kaley Espindola** 23:39  
Yeah.  
Thank you.

 **Jerilyn Taylor** 23:45  
All right, moving on to the role of the next level supervisor.  
So some of you may be in a position where you supervise employees who supervise others, and so you may be the next level supervisor.  
So you are responsible for reviewing the evaluation ratings and comments for those not, you're not the ones that you're writing, but the ones that are being written by those supervisors.  
Hopefully that makes sense 2 levels down we are looking for making sure that comments are consistent with what you know about those employees.  
So if you're meeting with the supervisors of other employees and they're telling you about progress to goals, they're telling you about concerns that they have about staff or glowing.  
Kudos for those staff are is that feeling, that sentiment reflected in those evaluations?  
So if you have a supervisor who saying I have an employee over here that I'm having difficulty with their performance, but then you have ohh devaluation that comes across your desk and that's rated A5, that's something you probably wanna push back with that supervisor.  
We don't.  
It's really difficult and we'll talk about this again later on in the session to have inconsistent ratings.  
So if we have something in the employees file that says year over year over year, they're rated as five, but the whole time they've been having performance issues and then the supervisor is having a conversation with the employees saying, hey, we've got some performance concerns with this employee.

 **Shantelle Romero** left the meeting

 **Jerilyn Taylor** 25:18  
Kaley pulls out the performance appraisal.  
Lot of the file and it's fives for the last 10 years.  
That's gonna cause Kaley some pause as she's dealing with how to work through these performance issues with the employee.  
So one great technique to do is consider holding what are called calibration meetings across supervisors and we will show you some uh ideas about what these calibration meetings look like, and we'll even play a game about what calibration can look like.  
But that's to make sure that in your department or division you are consistent and what a 5 looks like.  
What does a four look like?  
What does A3 look like?  
We have some examples of what those look like, but really when it comes down to implementing these performance evaluations, they're different in every department.  
So it's really a good process for supervisors to meet with all of their supervisors who are also delivering performance appraisals and making sure that across those different groups, you have a general understanding of what it takes to get what rating.  
So that one group doesn't have high ratings.  
One group doesn't have low ratings because one person is a lenient rater and one person is a very strict reader.  
All right, it's more comments.  
We have several staff that report to the Dean.  
Does the Provost need to review?  
So yes, if they were report to the Dean, the second level is the Provost.  
Am I understanding that right?  
Yep, as a whole, our Dean reviews are all self evaluations and ratings across the college.

 **Kaley Espindola** 26:55  
Mm-hmm.

 **Jerilyn Taylor** 27:01  
I assist with this.  
We look at consistency, comments and ratings. Awesome.  
It's.

 **Kaley Espindola** 27:11  
Did you?

 **Jerilyn Taylor** 27:11  
I just don't see how that how that Provost has that type of time.  
This is not a new process.  
There's as well for the year that I've been here.  
Last year, there was the second level signature as well.  
That right, Kaley?

 **Kaley Espindola** 27:23  
Yep.

 **Jerilyn Taylor** 27:24  
Yep.  
Umm.  
So if you're assisting with that to make sure the ratings are consistent across the groups, that's great.  
If you have an alternative way of doing that, I understand the Provost is a busy person.

 **Kaley Espindola** 27:34  
Now the Provost science does not review.  
Yeah.  
Yeah.  
Kara, I have a feeling that probably happens a few times.  
They should be having these conversations so the Provost, the training we're having here, talking about this different levels, we've had this conversation with Angela's been, you know, kind of reinforcing that at the cabinet level 2, umm, and it is for those in and consistency and we're going to talk about even 3% merit pool and there's a lot of other factors that are going into it.  
Into it so that does make sense that they do sign, but may not review in advance.  
And I think that's just.  
That's gonna have to continue to to be a discussion at the cabinet level as a process.

 **Jerilyn Taylor** 28:17  
And then of course, we have the role of human resources.  
We are here to support and develop supervisors, staff and those relationships between supervisors and staff.  
And we want to ensure a fair performance.  
Uh, system and process.  
And just like we are here today, our role is to provide training and recommendations about how this process goes.  
And we partner with all employees, including supervisors, to resolve any performance issues.  
Those types of questions, of course, are going to go to Kaylee if she gets too busy because there's too many going on.  
She may bat SIM over to me.  
But in general, those questions are still going to go to Kaylee.

 **Kaley Espindola** 28:53  
Umm.  
I mean, this is mine now.  
So faculty, this is the evaluation time period that we have updated.  
I think everybody has gone through maybe an extension period.  
I think I came in on the extended period for staff.  
We have finally nailed down nine month.  
That was quite the discussion process over the last year, but for the evaluation year till 12 month, faculty are still July 1st through June 30th.  
So we've got a couple more weeks for the end of 12 month faculty and nine month faculty, and I think we just released the announcement through HR two that the.  
Rating.  
If you year is going to be ending on May 15th, so obviously that happened now and then going forward, it's always gonna be this May 16th through May 15th.  
So that's the new eval cycle.  
They have the same five point rating scale.  
They're evaluated annually.  
Merit increases and this may vary slightly by college.  
The faculty ones are a little more nuanced, but based on the three year average performance standards are developed by the academic unit.  
So you know, we were lucky.  
Dean Vidler was actually in the training on Monday and so kind of gave us some input onto theirs and developing criteria per unit.  
So you'll work within those those academic units and make sure that error valuating per those standards.  
And then there's a peer evaluation process.  
The chair review Deans Review committee.  
University staff same as 12 month faculty.  
So those two are consistent July 1st through June 30th, again couple more weeks, 5 point rating scale evaluated annually.  
So that's just the one time check in and then merit increases in January are happening from the scores that are being sent in by September 1st to HR.  
Any questions about the eval cycle?  
Moving there we go.  
So this is a slide that I actually presented last year to the HRL's and I got some feedback that this is not quite how everybody does the exact process in their colleges.  
One of the big pieces of why Gerald and I thought it was really important to put the training together of this year is we have got to develop more consistent processes so that they are going to be uniform.  
They're, you know, we heard from a different department on Monday that they have their forms set up a little bit differently.  
It's the same type of form, but they have a little bit different.  
They add a few more things for the competencies and so the overall process needs to include an employee self eval which is you know the question earlier, it's that optional, it's not optional.  
They have to do their self evaluation.  
They're gonna send it to their supervisor.  
Supervisors reviewing adding comments starting to think about the conversation, looking at the goals you're going to set that intentional one on one meeting time, you're going to set 45 to an hour and have very intentional meeting with these employees saying this is to review the entire form.  
We're going to complete the ratings form with comments.  
Signatures get the whole form executed and then it's going to be sent back to HR on time.  
Would be great.  
Thank you.  
Any questions on the overall process on how this is standardly supposed to be?  
Any deviations that you're concerned about that you're experiencing in your areas, if you have nuanced ones, I'm happy to stay on.

 **Cindy Rhoads** joined the meeting

 **Kaley Espindola** 32:04  
Also, after the call, if you have other questions about my department does something a little different.  
If we want to talk through those processes, but ultimately that's what it should look like.  
So this is kind of something a little bit new and I wanted to highlight, I think it's really important.  
You know we are.  
We have their twenty 30s to treat your plan, and it has these two goals outlined, right?  
We're gonna foster a community of learning engagement, inclusive belonging, and we'll our invest deliberately in people, processes, infrastructure.  
So when I'm writing my goals you, I think everybody has a human tendency to say.  
Here's my very narrow focus.  
This is what I'm impacting.  
This is what it is.  
I want supervisors to take the strategic plan too and say how do I help my employee realize how their goals impact the future of UCCS not just today, not just this year.  
How is their goal tying into the strategic plan for the university?  
And I'm gonna read this one because I I got it in a presentation.  
I love it.  
So during a visit to the NASA Space Center in 1962, President Kennedy noticed a janitor carrying a broom, and he interrupted his tour, walked over to the man and said hi.  
I'm Jack Kennedy.  
What are you doing?  
And the janitor responded.  
I'm helping put a man on the moon, Mr.  
President.  
So he understood that his role as the janitor was putting a man on the moon like that is, and tying that back up.  
And I think some of that gets lost.  
So just as you're getting reviews as you're reading through them, you know, how are we tying this back up to the strategic plan?  
You may have a strategic plan within your own department or unit, but it all ties up and it should correlate up to this UCCS plan.  
The other part I know, Jerilyn said that she's we've made a few modifications this year.  
This is another big chunk that I would love to update for future years to come.  
So job competencies, I think everybody seen the review form.  
Those are just listed at the top right.  
Don't really have to do a lot with them.  
They're just theirs words on a paper.  
Umm, one of the departments when I was saying they kind of do their form a little bit differently, you know, it's so important to refer back to these like, how is it?  
So these are important for university staff accountability, collaboration, communication, diversity, inclusion, ethics and integrity relationship building.  
How are you identifying on a self evaluation?  
How I've demonstrated accountability, how have I collaborated across campus?  
How am I doing that and that should start coming out in those employee assessments and the comment section and what I was the department that does this.  
So in each of the roles, I think they actually outline accountability and collaboration.  
Scuse me and they have the person actually tie in and demonstrate how they've done that throughout the year and I would really like to see this.  
This happened in a previous institution that had this very similar thing and I, you know, outlining that for the year on how you're impacting the university and and demonstrating all the job competencies that are across the board for university staff, faculty are slightly more complicated.  
So they have the teaching, research and service.  
I would say one of the biggest areas that we have had and it was a good discussion on Monday too, is questions around professionalism and collegiality and civility.  
Where does this kind of fall for faculty?  
How was that rating come across?  
And I had a situation last year where a faculty member was given 5 all the way across because they're numerically scored for their teaching, research and service.  
And there was one maybe email sent about how they were not interacting appropriately with staff, but it didn't really lean into the eval score.  
So when we're trying to pull this whole case together and figure out what the best course of action is, it makes it really challenging.  
I know there is a professional rights and responsibility in the works and I think it has been Andy faculty on the call can trying into that one because I think it's probably a civil war, still a little bit farther out, but I think it's really important that you guys work on the faculty side with chairs, Deans, whoever you need to kind of get involved and say how do we tie some of this in because it is important.  
It's code of conduct is all these important things that need to be documented, whether that be part of teaching, research, service and what area that might fall in for those for those areas.  
I know it's not quite as clear sometimes for faculty, but hopefully that gives a little guidance on where we're kind of demonstrating the professionalism, civility, type of behaviors.  
And jumping into goals.  
So kind of going through the eval form right now.

 **Jerilyn Taylor** 36:19  
Excellent.  
So as we alluded to before, the one of the first steps in that process is the in the self evaluation, the employee is writing, where were they with goals in this last year.  
So that's looking backwards.  
Oh, I lost the slide.

 **Kaley Espindola** 36:35  
Uh, sorry.

 **Jerilyn Taylor** 36:36  
There it is.  
Thank you.  
So they're gonna write where they were in their self evaluation for their goals.  
What successes did they have?  
What barriers did they have in meeting these goals?  
Where did they succeed?  
This is their chance to toot their own horns, so if they want to find this is one of the ways like, these are the goals that I made.  
These are how I exceeded it and talking about the impact to the university and having made those goals.  
Can you advance this like Kaley?

 **Kaley Espindola** 37:07  
Yep, didn't.  
If you shared again, sorry.

 **Jerilyn Taylor** 37:09  
OK, we didn't yet.  
Alright, So what are the reasons why Kaylee talked about the strategic goals earlier?  
Not only because performance appraisals are important to help employees grow and develop, which is part of our strategic plan, but also to raise awareness about you can set goals for employees or help employees set their goals based on the strategic goals of the university, cascading down to what the department goals are cascading down to employee goals.  
So employee goals feed up to what the department needs to accomplish.  
What is the impact of the Department of the division needs to have on the university and how does that feed up to the strategic goals?  
Everybody knows IKEA, right?  
Give me a thumbs up if you know IKEA.

 **Kaley Espindola** 38:04  
No, no thumbs.

 **Jerilyn Taylor** 38:04  
If not, then there's some thumbs.  
So if you don't know, OK, there's the thumbs.  
I I will give everybody up by having to be like ohh I need to find my reaction.  
Ohh so I can't.  
If you drive a little bit north on 25, you'll find a place where there are furniture that you build yourself.  
Does anybody has anybody ever heard of the IKEA effect?  
You may have to unmute yourself if you ever heard of the IKEA effect and I'll give you a Gold Star later.

 **Jenna Press** 38:38  
The aikea effect is when you put more value towards something you created yourself, rather than something that you've purchased.

 **Jerilyn Taylor** 38:43  
And I love it.

 **Kaley Espindola** 38:44  
Mobile.

 **Jerilyn Taylor** 38:45  
I will send you a Gold Star that that is absolutely true.

 **Jenna Press** 38:47  
Yes.

 **Jerilyn Taylor** 38:49  
It's actually a study done by Harvard that says that there is an IKEA effect.  
So in at IKEA, you build your own furniture, you walk out with these boxes that are this big that is going to make A6 drawer, dresser.

 **Kaley Espindola** 39:02  
Yes.

 **Jerilyn Taylor** 39:05  
Once you get it home with nothing but a little Allen wrench and some little pegs that they give you so you put IKEA furniture together yourself, or you hire somebody off of thumbtack to do it for you.  
But the IKEA effect says that it's our human tendency to love things that we create and that we contribute to.  
Why am I bringing up this IKEA effect when it's talking about goal setting?

 **Kaley Espindola** 39:34  
I should also comment Jerilyn is very comfortable with uncomfortable silences.

 **Jerilyn Taylor** 39:38  
Oh, I forgot about that fact and the this my way of gating participation, especially on online classes and is to allow really uncomfortable silences.  
So I'll just sit here until somebody asked answers.  
This one I will cause this ones kind of a hard one to tie together.  
So the IKEA effect is important when we're talking about employee goal setting, because it's important for employees to have a say in what their goals will be for the next year that will help them be engaged and wanting to contribute to whatever those goals are.  
So if you as a supervisor or manager come in and say here are your goals for this year and this is what I need you to be doing, the employee doesn't have the buy in.  
They don't have the investment in the engagement in completing their goals.  
According to the IKEA effect, if you have an interactive conversation with the employee so they start on their self evaluation, here are the things that I want to accomplish this next year and then you come in and say that's great, that meets our department goals that meets the universities organizational goals and have that conversation.  
But the employee has started that conversation, saying here's what I'm interested in working on this year.  
They are more likely to meet those goals and be engaged to meet those goals.  
Does that make sense?

 **Kaley Espindola** 40:59  
2nd.

 **Jerilyn Taylor** 41:01  
Any questions on that?  
So when you are setting goals or you're working with your employees to set goals, it's important to make sure that they are smarter goals and the the first part of that acronym is Smart.  
And then we've now added on error to make sure that it's a complete cycle of goal setting.  
So smart goals many of us have heard this before.  
This relates to a lot of things besides just performance appraisals.  
Smart goals are specific objectives, must express the action and the results required by the staff member so they know exactly what they're supposed to be doing.  
Goals are measurable.  
They have a way to see.  
Has it been done?  
Has it not been done?  
Has it been done 80% of the way, 20% of the way?  
So when you're setting those goals, you wanna make sure that there is a way to track how far employees have gotten with those goals.  
Smart goals are attainable.  
They're not the shooting to the moon type of goals.  
They are something out within a year.  
An employee can reasonably get done.  
They're manageable.  
They're possible within the current workload, although they may have to stretch for it a little bit.  
They may have to prioritize getting their smart goals done.  
It may be a little bit of thought for them rather than just their routine of what they do in their work.  
Smart goals are relevant and they are realistic and they're relevant to their job.  
They're relative to the work that we need to do at the university.  
They're not something that would not add any impact to the university and what our goals are for the university, and there are time bound.  
That means there's a deadline.  
There's an understanding of the time frame on when this should be achieved.  
Now the UR part of the smarter Goals is basically the part that we are evaluating and readjusting.  
So if somebody sets a smart goal that says I'm gonna do this by August and then in the meantime there's been a change in leadership, there has been vacancies in the positions in the department, there's been some turnover or go for the department has kind of changed course.  
That's where you're gonna need to evaluate.  
Is this still the smart goal we want and do we need to readjust and maybe take a different approach?  
Maybe we need to change the deadline?  
Maybe we need to try a different tactic.  
Maybe we took on more than we can realistically do in this time frame, so it's completely OK and the smarter framework to say we need to adjust this throughout the course of the year and you as your supervisor are having meetings, whether they're once a quarter, couple times a year to make sure that they're on target, they have what they need you as their supervisor, if they're having barriers you know, are you able to reduce those barriers and do you need to readjust?  
All right, now we're going to go to some examples of what smart goals look like.  
So an unclear goal.  
Complete mandatory training is that specific.  
Maybe they know what the mandatory training is.  
Is it measurable?  
Sure, we can get course certificates.  
Yes or no for the completion.  
Is it timely?  
There's no deadline in that, so if you look at the one below it, the smart goal complete, the HR mandatory certification training for new employees within 60 days of your hire.  
Honestly, not even sure that even like that smart goal, because it seems like a basic expectation of somebody's job for a new employee.  
So that's not a something that's helping them stretch to learn to grow.  
Its a check the box.  
Yes, you've done that.  
Now maybe for a brand new employee that's the the the goal to have, but maybe for somebody who's been here a couple of years completing mandatory training may not be irrelevant goal for them.  
Let's try something else.  
Alright, smart goal strengthens supervisory skills.  
All right.  
Time for you guys to unmute is strength and supervisory skills a smart goal?  
What are we missing or what do we have about strengthening supervisory skills that is specific, measurable, actionable, realistic and timely?  
Is it specific?

 **Crista Hill** 45:49  
It's not.  
It's not any of those.

 **Jerilyn Taylor** 45:52  
Thanks.  
She knows how to feel.  
Uncomfortable silences. Thanks.  
So if you look at the smart goal down below, is it timely give me a thumbs up if it you think that smart goal down below is timely.

 **Kaley Espindola** 46:12  
If it's hard to find your button, you can pop on and give a thumbs up.

 **Jerilyn Taylor** 46:16  
Alright, I see. Thumbs up.  
Alright.  
Is it specific?  
Do you see the specific behavior or task that you need somebody to do in order to achieve this goal?  
Yeah.  
Yeah, see some thumbs up.  
Is it relevant?  
Awesome.  
Is it attainable?  
Is it attainable for somebody to take the leading yourself or leading others?  
Professional development course is it offered by the university?  
Yep, you bet it is.  
There's a set time frame that it takes.  
We know how long those courses are, and if you've never heard of this leading yourself or leading others, send me a message later and I'll tell you all about it, because this is available in live and real at the university right now.

 **Kaley Espindola** 47:09  
Shameless plug.

 **Jerilyn Taylor** 47:09  
Alright, I'm going to give you a tool on how to make sure that you can set smart goals for any employee about anything.  
Kaley called this a mad livelier, which I think is kind of cute.  
And I think that's really a funny way to think about it.  
And then we're going to hopefully break into breakout rooms.  
Cindy in HR popped into the meeting and set us up with some breakout rooms, so hopefully that's gonna work.  
And I'm going to have you guys practice in smaller groups.  
So here's your practice.  
Here's an administrative assistant.  
Her job is to.  
Do front desk reception duty, including greeting, checking in clients.  
They're also responsible for balancing charges, so the amount that's coming in to the department, revenue received, scanning patient documents.  
So people are paying copays.  
They're looking at medical records, things like that.  
So here's the template to build a smart goal for any employee over any job.  
The template buy blank fill in the date by February 24.  
They will.  
Then you're going to list whatever behavior activity training that you need them to complete based on their job duties.  
This will be evidenced by blank.  
So that's how you know that it's completed and it's measurable.  
So if you can say it'll be evidenced by a completion certificate, customer comments, audit procedures, then you know it's measurable.  
If you can't insert the blank for, this will be evidence to buy, then likely you're trying to set a goal that's not measurable.  
Alright, so hopefully we have some breakout rooms.  
If not, we'll just have to do it in a larger group.  
But I'm gonna give you guys 2 to 3 minutes in a breakout group to be able to set a smart goal.  
If you don't remember and you don't do it, office administrative assistant maybe set one for your own.  
And your own department.  
All right, looks like you're going to go in just a few seconds and we'll join you back in two to three minutes.  
Have fun.

 **Nicole Weis** left the meeting

 **Robert Sackett** left the meeting

 **Laura Austin-Eurich** left the meeting

 **Megan Mueller** left the meeting

 **Frederick, Kristine** left the meeting

 **Ida Dilwood** left the meeting

 **Elizabeth Wyatt** left the meeting

 **Michelle Dorne** left the meeting

 **James Rehkopf** left the meeting

 **Kendall Wehrer** left the meeting

 **Edwardo Portillos** left the meeting

 **Kara Carragher** left the meeting

 **Sarah Meier** left the meeting

 **Crista Hill** left the meeting

 **Daniel Segal** left the meeting

 **Jeanette Dias** left the meeting

 **Jerilyn Taylor** left the meeting

 **Shanelle Cruz** left the meeting

 **Robert McGann** left the meeting

 **Kimberly Guyer** left the meeting

 **Jenna Press** left the meeting

 **Kaley Espindola** left the meeting

 **Marcus Davis** left the meeting

 **Vanessa Ea** left the meeting

 **Larry Lee** left the meeting

 **Maja Krakowiak** left the meeting

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 **Robert McGann** joined the meeting

 **Jerilyn Taylor** joined the meeting

 **Kaley Espindola** joined the meeting

 **Kimberly Guyer** joined the meeting

 **Crista Hill** 53:24  
OK.

 **Jeanette Dias** joined the meeting

 **Ida Dilwood** joined the meeting

 **Sarah Meier** joined the meeting

 **Vanessa Ea** joined the meeting

 **Megan Mueller** joined the meeting

 **Ida Dilwood** 53:26  
Here literally.

 **Kendall Wehrer** joined the meeting

 **James Rehkopf** joined the meeting

 **Robert Sackett** joined the meeting

 **Kara Carragher** joined the meeting

 **Jerilyn Taylor** 53:29  
Welcome back, welcome back.

 **Ida Dilwood** 53:33  
Pleasure.

 **Shanelle Cruz** joined the meeting

 **Jerilyn Taylor** 53:35  
Thank you guys for playing along.

 **Kaley Espindola** 53:35  
Yeah, like a big that was awesome.  
It worked.

 **Jerilyn Taylor** 53:41  
Hopefully.

 **Kaley Espindola** 53:43  
Are we still sharing or might not sharing?

 **Jerilyn Taylor** 53:45  
You are not sharing right now.

 **Kaley Espindola** 53:49  
What's so close?

 **Jerilyn Taylor** 53:51  
All right.  
I would love to hear if there's any group that is interested in sharing.  
Were they able to come up with a smart goal, whether it's for your own department or for this example of the administrative assistant?  
And I realized after we went into the breakout groups, you couldn't see these slides anymore.  
So I apologize for that.  
Who would like to share?

 **Ida Dilwood** 54:20  
Not talking again, I can share part of ours.

 **Cindy Rhoads** left the meeting

 **Jerilyn Taylor** 54:25  
Thanks, Ida.

 **Ida Dilwood** 54:26  
We it took us a little while to get started and then we didn't have this slide.  
So we started making up our own and then we saw the 10 seconds was elapsing.  
So we said something like answer the phone 90% of the time, maybe if there was unforeseen circumstances like they have to use the restroom and they got a few phone calls when they were gone, maybe we would say something like return EA missed phone calls within 24 hours or something like that.  
So, UM, so then we're accounting for enforcing.

 **Jerilyn Taylor** 55:09  
Awesome.

 **Ida Dilwood** 55:15  
So that was something that we talked about.

 **Jerilyn Taylor** 55:18  
Perfect.  
And assuming that you're in an environment that you'd be able to monitor that in some way to see how fast calls got answered and some type of call center or something.  
So here's some examples that I wrote down thinking about this administrative assistant.

 **Ida Dilwood** 55:28  
Sure.

 **Jerilyn Taylor** 55:32  
By April 2025, they will establish a written process accurately for balancing charges and revenue.  
This will be evidenced by written procedures.  
And another one was by December 2025, they will scan in paper patient documents.  
I'm just making up something I don't know.  
This will be evidenced by the history portion in a patients medical record and the previous paper files being shredded, but hopefully that gives you a little bit about the tempo, about what it looks like to set smart goals, questions on smart goals.  
Ready to do some Madlib smart goal making with employees when the performance evaluation process comes into place?  
Uh, here are just some examples of professional development, so if you need ideas about what to write for smart goals or what to encourage employees to look at for their goals, here are some ideas.

 **Nicole Weis** joined the meeting

 **Jerilyn Taylor** 56:31  
You know, it might be serving as a chair and a committee.  
It might be some on the job training or cross training.  
One of my personal favorites is writing new procedures etc.

 **Kaley Espindola** 56:44  
No.

 **Jerilyn Taylor** 56:46  
All right.  
So moving on to the rating scale, I when I get a chance when Kaley starts talking, I'm gonna put in the chat.  
This document it's also available on our website.  
It is the rating, scale, rubric or tool something to that effect for.  
University staff the rating scale for faculty is the same 5 outstanding 1 being failure to meet expectations, but this particular document is specific for university staff.  
We don't have a similar document for faculty, although some of the ideas might be the same.  
Umm, so you can see in here we have.

 **Kaley Espindola** 57:26  
They're gonna.

 **Jerilyn Taylor** 57:28  
Sorry, Kaley.

 **Kaley Espindola** 57:28  
Thanks.  
You're making the next one, so there's smaller chunks or keep it on this one.

 **Jerilyn Taylor** 57:32  
Yep.  
You can zoom in a little bit.  
Some examples of what A5 may be.  
Now these are only really intended to be examples.  
This is not an exhaustive list to say you have to be able to justify with these three bullet points that these the employee has done one or all of these in order to get a 5.  
This document was created as a way to just demonstrate what if I've may look like and then you as a supervisor and coordination with others on your team, we'll decide what that looks like within your specific department for your specific teams about whether the person is A5 or a four.  
So for the five, you'll see they are far exceeding performance expectations.  
Their work is exceptional quality and in addition to that there making exceptional or unique contributions to the unit, the department or the university.  
Uh, and then some examples for #4.  
They're always achieving performance expectations and frequently exceeds them and their have a work performance that is a very high quality in areas of responsibility and then you can see some examples of the ratings.  
Maybe they've created some new processes?  
They've identified problems and created solutions for it.  
Questions on fives and fours.  
All right, so three is the meeting expectations.  
So this is an employee who is doing their job and they're doing their job well.  
They consistently fulfill performance expectations.  
Maybe they periodically exceed them.  
The hardest part I think for employees and we heard this in the last session that we did as well and I've heard this, that other organizations that I've worked at is that employees correlate 543 to ABC and that's really not an accurate way of thinking, especially if you were an A student in school.  
You're thinking I needed to be a five.  
You can be in a student and be a three, and there's nothing wrong with being a 3A3 is not subpar.  
It's not not doing well.  
It is actually in fact, doing your job well.  
But if five is above and beyond your job.  
We also have twos and ones.  
We don't have a lot of examples in here for twos and ones, and the last group that we had, we had some questions about.  
Should we define that better and what is the difference between our two or one?

 **Jenna Press** left the meeting

 **Jerilyn Taylor** 1:00:19  
The reality is if you have an employee that is getting rated or tour one, you should be having conversations with Kaylee about that person's performance, their rating of A2 or A1 should not be a surprise, actually.  
That no ratings should really be a surprise because you are having conversations with your employees about their performance throughout the year, right?

 **Kaley Espindola** 1:00:34  
Right.

 **Jerilyn Taylor** 1:00:40  
But if they are A2 or A1, you should be having a conversation with Kaylee about what that looks like on a broader spectrum rather than just the performance evaluation.  
If you are rating somebody A2 or A1 or A5 or A4, you are required to have comments in there to justify those ratings.  
So make sure as you're turning it into your supervisor and you're turning it into HR, you have comments that justify why is this person A5.  
There are five because they did ABC.  
There are four because they ABC.  
So far so good.  
All right, moving on.

 **Kaley Espindola** 1:01:31  
So couple of the rating pitfalls that we see people run into and this is I think we'll talk about some other best practices around annual performance evals.  
But some of the the reigning pitfalls that we see supervisors run into Halo Horn effect, right, so the Halo effect, it's like Angel devil, the individuals performance is is really just perceived positivity, right?  
Like they come in and they're cheering and they're great and it's just a positive experience, but they're really not doing a lot of work.  
But you're your rating them a little bit higher because it's nice to be around, right?  
The horn effect is really kind of based on negative quality or feature.  
So if I am just Bah humbug all the time and.  
You know, maybe quieter meetings just, you know, something?  
That's rub it.  
As a supervisor is not up to where you kind of wanna see that you know you're being judged just on that, not the work on producing.  
I might be doing a great job at my job, but there may be some negative qualities that you're kind of being judged on.  
I think one of the big ones will leniency.  
So you know the honest ratings.  
It's hard to have tough conversations sometimes and be prepared for those.  
Recency is what I I personally have a hard time with and I love Gerald and I took that back.  
I give it to my team, this me book.  
You know, it's hard to remember what I did a year ago.  
And you know what?  
What are all the steps that have been taken since then and you know accomplishments you've had?  
So even as a supervisor, you have maybe had a really positive interaction or a bad interaction in the most two, you know, two to three months and you're using that as your reference to to to do the overall annual rating.  
You know, similarity is kind of those biases.  
They're like me.  
I get it.  
I've had maybe a different type of relationship.  
I know this person outside of work and I'm kind of being a little bit too personal in the rating as opposed to really tying it back to those goals, competencies, strategic plan and all of that.  
So the rating calibration, so these are really important conversations.  
Like Carolyn said, we have a game coming up, so we'll get to practice this a little bit.  
Umm, I think this is a university.  
I don't know.  
It's like it's just a university wide thing that, like Jerilyn, said, the A/B CD1234 just kind of all falls into those patterns.  
So how do we reset that?  
And Jerilyn gave a good example earlier of like setting with your team at the very beginning, saying here's what A3 is.  
Here's what a four is.  
Here's what I5 is again, twos and ones.  
Probably different conversation, but you know you want to sit down with your, your team and really kind of set this calibration.  
We want to say here's what it is you want to remove your biases, seasons season versus new employees that you supervise.  
Tougher, easier assignments.  
You're a tougher, lighter grader.  
We're getting everybody on the same page, you know, like Jerilyn said, too, forgetting your group of managers in the same.  
You know, if you're a Dean and you're getting all your chairs together, your chairs and directors and saying, let's reset this calibration, I wanna understand where your three is.  
Your three is your three is and now as a unit.  
Here's where our three is gonna lie.  
So it's really important to do this work.  
We understand that it is tough to have these conversations here.  
We're also having them from upper levels and down.  
We're trying to have them from employee standpoint up like you're also an employee needing to understand this.  
And you're gonna have a performance eval that you're turning with your supervisor too, so trying to really bridge this gap and making sure that people understand what I3 is, a four is A5 is, and that it's more consistent across graders.  
So the goals would kind of went over this too.  
But you know, ensuring the supervisors are well versed the definitions, understanding some of the the areas of opportunity that we just talked about on the previous slide, you know, discuss the complex issues, I think we had some really good discussion around like this is very unique in our area and this is you know maybe even the criteria is different in this area versus this area.  
And so how do we how do we ensure that A3 will work?  
Or what are things that I can take into consideration when I'm doing my three?  
What you know behaviors exemplify a top performer, and then all of your managers are kind of on the same playing field.  
I know it gets really tricky.  
Those five threes, fours and fives are probably the hardest area, but we want to reward top performers.  
We want to reward the five is when they get fives.  
We want to make sure that people that get threes feel truly valued.  
This is you're doing your job.  
You're doing it well and so kind of resetting all of those.  
Just a quick question, if everybody been a part of the calibration meeting?  
Either here or in other institutions or organizations.  
This is a brand new term for everybody.  
No, no responses.

 **Kara Carragher** 1:06:26  
Kaley, I assist the Dean with our overall collaboration meeting for the entire college.

 **Kaley Espindola** 1:06:32  
Yep, that's great.  
That's a that's a great practice.  
It's a new term.  
Perfect.  
So hopefully we can kind of take this and you know, one of the things that jerilyn and I you know, we have a lot of change in our leadership over here in HR and we want to continue to develop.  
We want to create resources.  
We want to have these consistent conversations with you guys and starting here in calibrating the rating levels within your own units and departments is just a really great way to start.  
We're here to help assist with that as needed.  
Umm.  
And now we're gonna play a quick little game and we're not.  
We didn't do a poll.  
We have a calibration challenge, so I do need people on screen, so if everybody can pop on just really fast, we're gonna do a show of fingers because we didn't do a pull for it.  
So I'm going to read a job duty and a behavior associated and knowing that we've gone through the 12345 sound like we were on pretty similar pages there, you're going to raise a finger.  
We'll see how many fingers we can see on the screen at one time and see what you guys would write this person based on this job duty and the behavior.  
So the job duty contribute to the student success center team by abiding by team norms, taking responsibility for keeping current technical knowledge sharing with others, accomplishing tasks affecting other team members in a timely manner, and representing the student Success Center and professional way at all times.  
The behavior is seen as an expert in the department.  
Employs consistently.  
Go to this person for Procedure interpretation.  
In addition, created new employee training, mentored several new staff and their first 90 days new staff members report feeling welcomed and well trained.  
Would you guys rate that person?  
Seeing some fours and fives like Marcus, did you give a 2?  
Is that a fine?

 **Marcus Davis** 1:08:24  
That there was a 2.5.

 **Kaley Espindola** 1:08:26  
2.5 OK, which actually?  
Well, I don't think you have classified any.  
Never mind.  
Never.  
So this one was really seen as a 5.  
So they're kind of going above and beyond their job.  
They're very clear what their job duty is.  
They're helping welcome new employees.  
They're having an impact on their department overall.  
It's a great job.  
Read it another one.  
So the job duty is to collaborate with, yeah.

 **Ida Dilwood** 1:08:47  
I'm sorry, Kaley.  
Real quick, I missed you talked really fast there.  
You said.

 **Kaley Espindola** 1:08:52  
Like A5.

 **Ida Dilwood** 1:08:52  
What would that rating be?  
OK, that is not.  
You have to really like walk on water to get fives in our division.  
I'm just saying nobody gets fives.  
Nobody can give a 5, so this is really interesting, but thank you.

 **Kaley Espindola** 1:09:13  
So I don't. Yeah.  
So the yeah.  
Yeah.  
And again, this is a the the calibration conversation is happening here and at other meetings, and also at the cabinet level, because this is actually the second time now we've heard that some supervisors come in and said we don't give fives.  
That's not true.  
We absolutely should give fives when people are deserving of the five and then people understand the threes and then there's aspirations and motivation to get to the five, all the things.  
So we are slowly building there.  
I really appreciate that idea, though.  
It's definitely a note that I have made as well, Kimberly.

 **Kimberly Guyer** 1:09:50  
I I think maybe I missed this, but one difference for me would be the question of is it expected that this person is mentoring staff and on boarding?  
Like, are they their team?  
You know, do they report to them or is this someone who's kind of, you know, going beyond that and trying to help beyond their department and beyond job expectations?  
So that would be a difference for me.

 **Kaley Espindola** 1:10:13  
Yeah.  
Then this it's hard with the like.  
Yep, no, I think that's a great question.  
And it's funny, I think in the other training we were kind of going through these.  
I'm like, don't think too much about them, but when you're doing the evals, please think about them.  
The whole picture of it, so we're just giving you one little snapshot.  
What's your gut telling you?  
Kind of for that evil.  
Great questions, though, and yes, you would take the whole picture into consideration if that's an expectation, a norm, or if it's above and beyond.  
Umm, OK.  
So the job duty is collaborate with academic and other departments to provide outstanding customer service.  
The behavior is received numerous concerns regarding inappropriate behavior when representing the department on cross departmental meetings.  
What identify challenges to propose changes but not provide solutions?  
How do we thinking?  
Right.  
It's seeing some ones and twos.  
Perfect.  
Yep.  
So this one again, there's probably bigger conversation, but there are rated at 2.  
So take that back and not meeting expectations.  
You know the one, the one and two, they are really close on the way.  
I was kind of explaining it from an employee relations standpoint is we're kind of maybe at that first conversation not meeting expectations.  
Some concerns are coming up.  
We're not there.  
Repeatedly having more conversations than a one is we're probably having a tougher conversation.  
If you're still here for review, time is kind of that threshold.  
So where have you been involved in the employee relations process?  
Umm, so that's just something to consider, but that's a good one.  
Alright, we'll do one more and then we'll move on because we're getting close around time.  
So the job duty is collaborates within and across disciplines and departments and serves on campus committees related to Wellness initiatives and evidence based programs.  
The behavior participates in assigned committees.  
Volunteers, ideas and completes assigned tasks on time, efficiently and professionally.  
All right, seeing some threes and a couple 4.  
So this one was determined to be a 3, so that's great job.  
You know it, depending on where we kind of again more bigger picture scope of things could be a four could be above and beyond.  
But ultimately, they're doing their job efficiently, professionally, completing assigned tasks on time.  
So good job and I will go ahead and move on.  
Was that a good?  
Is that helpful?  
It's kind of nice.  
We did a little bit of more of a breakout session in the other one too.  
We can kind of use examples from your own department of here's where I think we have five employees.  
Here's an example of a one in our department and you guys can kind of collaborate and calibrate within your small teams.  
But is it helpful to see that as graders on here getting this bit of information that we're pretty in line, there's been a couple that were maybe more circumstances would help us identify maybe that 3-4 better, pretty consistent on the ones and twos that helpful, yeah. OK.

 **Jerilyn Taylor** 1:13:17  
And and I want to emphasize it in my opinion, I think it should be difficult to get a 55 should be not everybody, not everybody's A5, we would have the highest functioning organization I have ever worked at.  
If every employee in this organization is A5, they are far and few between.  
They're hard to come by there.  
They shouldn't be impossible at, you know, Daniel said in the chat.  
There should be no rules to limit a certain rating, like a five.  
That would be discouraging if I were that unit.  
Yep, we heard that.

 **Kaley Espindola** 1:13:49  
Mm-hmm.

 **Jerilyn Taylor** 1:13:49  
Yep.  
Umm and I give examples to my employees about in their job.  
This is what it will look like for you to be a 5 so that they have a clear understanding of how they can achieve A5.  
And somebody said in the last meeting, which I thought was a great idea and it's required to have comments on why the person is A5.  
But she said.  
I practically wrote a novel to make sure that people knew that this was an outstanding employee, that this is somebody we should not be losing as a university.  
Uh, that we need to hang on to and that they really are going above and beyond.  
And this supervisor took a lot of time to express that and make sure that those comments were seen by others and that it was justified that that was a 5.  
So we're gonna move on to a slightly different topic here.  
Ohh yes Marcus, go for it.

 **Marcus Davis** 1:14:45  
So I have a quick question.  
So like with our classified staff, my, my group's classified staff, we've had the 123 and in the past.

 **Kaley Espindola** 1:14:52  
Mm-hmm.

 **Marcus Davis** 1:14:52  
So I do a lot of times where say I have a high made medium range.  
I'd use a 2.5.  
I'm sorry.  
I was using the 123 method.  
The first question, sorry.

 **Kaley Espindola** 1:15:01  
You.

 **Marcus Davis** 1:15:02  
So I would put me in a 4.5, but will you have four point fives?  
Will you have four point eights in you're in this new tier system of one through 5 or will it just strictly be 12345?

 **Jerilyn Taylor** 1:15:13  
So the university rating scale only has the 12345 classified is a separate form completely, and we're gonna have to have some additional communications about the expectations for the classified staff.

 **Marcus Davis** 1:15:24  
Sure.

 **Jerilyn Taylor** 1:15:25  
So look for that in the coming weeks cuz we are switching from A1 to three to a one to five.

 **Marcus Davis** 1:15:32  
That's what I understand.  
You OK?

 **Jerilyn Taylor** 1:15:34  
Yep.  
And so we need to do some some different communication and some different training on that.

 **Kaley Espindola** 1:15:34  
It.

 **Marcus Davis** 1:15:34  
Thank you.

 **Jerilyn Taylor** 1:15:39  
But thank you for that question.

 **Marcus Davis** 1:15:39  
Thank you.  
Yes, ma'am.

 **Jerilyn Taylor** 1:15:41  
Stay tuned.  
Alright, so we're going to switch to a little bit of information about how the ratings affect merit increases.  
This is one of the questions that we get quite frequently when we start communicating out the merit increases, so schools and divisions are given a flat dollar amount based on the percentage awarded by the regions.  
So you'll see the region say we've awarded a 3% merit pool.  
Well, that merit pool is based on our budget and when it gets to the division in the department, it is given in a flat dollar amount for the divisions to disperse based on ratings.  
So it's not if you have a 3, you get a 3% merit increase.  
That's not the way it works, and I think when employees start seeing ratings and then start seeing their merit increases, that gets a little bit like, wait, what?  
What I saw that there was a 3% merit pool.  
I figured if I was meeting expectations, I would get that 3% merit increase, but that's not the way it works.  
So the ones and twos for performance evaluations are ineligible for merit.  
They will get no merit increase at all.  
Umm.  
And does anybody know why?  
I have a picture of peanut butter on a piece of bread here.  
You make you think I get really abstract.  
We're talking about IKEA.  
We're talking about peanut butter.

 **Marcus Davis** 1:17:10  
No, Joey.

 **Jerilyn Taylor** 1:17:10  
So if we.

 **Kaley Espindola** 1:17:11  
Logically.

 **Jerilyn Taylor** 1:17:15  
Because it's lunchtime and we're hungry and ready to get out of this meeting.  
So if a division rates their entire division or their entire school with high ratings, it will spread out that merit pool dollar evenly and very thin.  
So that's the visual I want you guys to think of.  
Is it spreading peanut butter around?  
So if everybody in the department is rated A5, that merit flat merit pool dollar is going to get spread very thin.  
Can you go show the next like Kaley?

 **Kaley Espindola** 1:17:50  
Yep, Yep.

 **Jerilyn Taylor** 1:17:51  
So if you were to have a merit pool of 3%, that equates to a dollar amount for this completely fictitious department as $600.  
If you rate two employees of three, an employee of four and an employee of five, that's $600.00 gets spread out in a flat dollar amount.  
In this way, which equates to these percentages.  
So an employee who got a three got a 2% raise.  
An employee who got a four gets a 3% raise.  
An employee who got a 5 gets a 5% raise because that's the percentage that equates to that flat dollar amount to equal this flat dollar amount for the merit pool.  
So does that seem consistent?  
So you're rewarding the higher performer with an increased dollar amount because they are a high performer.  
So now let's take the same example.  
And see what happens.  
If we rate everybody fives, if we read everybody of five, each person gets $150.00 and it's a 3% merit increase.  
So now if you have high performing employees and they're getting a 3% increase, which was what was said as the merit pool of 3%, how do you think that employee is going to perceive it?  
So I'm an outstanding employee and I got basically the 3% email, maybe a little discouraging.  
So if you have everybody rating A5 in your unit, then you're spreading out the merit pool dollars dinner.  
So it's one of the ways I want to encourage people to have honest ratings and that not everybody is A5 and some people are naturally going to be threes.  
Some people are naturally going to be 4, as in a few people may be fives.  
Questions on that.

 **Kaley Espindola** 1:20:07  
James asked how does this work for auxiliary departments?

 **Jerilyn Taylor** 1:20:11  
Oh, that's a whole good budget question and we can talk and talk to Suzanne if you want some additional information because I don't wanna get into all the budget and misquote how the budget actually works.  
Because auxiliaries have funding sources and all this other kind of stuff, that was just meant to be a very general super generic, the answer is that, OK, James?  
It's.  
OK, not hearing him telling me.  
No, stop.  
We need to stop everything.  
So we're gonna move on and then we can talk offline if we need to.  
To the top five challenges.  
Umm.  
With performance appraisals that we see and this is not unique to UCCS, this is kind of human nature supervisory 101 for every organization that Kaylee and I have ever worked for, one of the biggest challenges is dishonest feedback.  
It can be hard to have those hard conversations with employees where your rating them a 3 because they're doing their job, but they think they are A5.  
It's hard to have a conversation with an employee saying, hey, you need to improve.  
I've got some real big concerns here.  
We're not meeting our goals as the department.  
You're not meeting deadlines.  
You've got complaints from people in the department or from students and parents, but then you rate them before or A5 because you don't want to have that tough conversation.  
And that really creates a problem and risk for the university.  
If something were to happen further down the road, we can get challenges for well, I got fives for the last five years, but now all of a sudden you're telling me I've been a bad performer for the last four years.  
That's inconsistent evaluation and it's not fair to the employee.

 **Nicole Weis** left the meeting

 **Jerilyn Taylor** 1:22:05  
The employee deserves honest feedback about how their performing so that they can get better.  
If you're telling them they're doing great, they're going to keep doing the same thing because they don't know that you're supposed to be doing anything different.  
I'm having inconsistent evaluations or dishonest feedback and create sudden dissatisfaction for the employee.

 **Laura Austin-Eurich** joined the meeting

 **Jerilyn Taylor** 1:22:27  
Uh, when you have a poor performer on your team that's not getting addressed, it could create issues among the team, with the team being dissatisfied and having morale issues.  
We didn't spend any time talking about subjective versus objective evaluation measures and hopefully you've seen these terms before and we don't want to write subjective performance evaluations where we're using our own preferences, for example, that how to evaluate an employee you're using objective measures, things that are measurable, things that are quantifiable, things that you have evidence behind it, not your.  
Preference your bias things that can't be easily measured or documented, and we certainly don't want to see it.  
A deviation from the normal evaluation practices and procedures.  
So there Kaley showed that slide of the steps in the process.  
That's the steps in the process that we need to follow.  
They're pretty easy.  
We try to keep the form pretty simple.  
It's not a very long, cumbersome form, but you should be having conversations with the employees.  
It's not an email.  
It's not a phone call, it's a conversation.  
Do you have anything to add to that, Kaley?

 **Kaley Espindola** 1:23:50  
No, I think you kinda he hit all the ones that I was kind of thinking through, yeah.

 **Jerilyn Taylor** 1:23:57  
What?  
Alright, so a couple of recommendations and requirements.  
If there was a supervisory change during the evaluation year, all supervisors are requested to contribute to the evaluation.  
I know sometimes a supervisors have left.  
Obviously, we're not gonna have that feedback for them for that employee, and there's going to be some extenuating circumstances where you need to think through.  
OK.  
Does this really make sense?  
I've been this supervisor for 10 months.  
Out of the 12 months period and things like that.  
So for specific questions like that, or have we had some interesting scenarios in the last session?  
Give Kaylee a call and you guys can walk through exactly what makes sense for the employee and that specific case.  
Uh, we talked about supervisors being expected to provide comments that provide context to their ratings so that we can see and make sure that we have evidence of why this employee is A5 versus another employee being A3.  
All employees receiving a rating who were employed during the evaluation cycle, so we will track any HR who umm has turned in evaluations.  
Who hasn't?  
Please make it easy for us and turn them in so we don't have to track you down.  
Track your supervisor down to track you down.  
But we do need to have those on file for all employees and the supervisor and the next level supervisor will sign the evaluation before it gets into the employees file.  
All right.  
Final questions, final thoughts.  
Questions for a screen so you can't throw tomatoes at us. Sorry.  
So this is the second time we've done this training.  
Uh Kara has a question question on the self evaluation form.  
There is an item on the second page.

 **Larry Lee** left the meeting

 **Jerilyn Taylor** 1:25:56  
You can't see that.  
Is this for the employee to add comments, feedback or does supervisor fill out this section?  
Yes, that is for the employee to say what are their comments, maybe they want to include feedback for their supervisor.  
What challenges have they had in this year?  
What are the successes they want to sing about themselves?  
This is the chance for the employee to say hey, here's why I think I'm A5.  
Here's why I rated myself A5 on the self evaluation.  
Uh.

 **Kaley Espindola** 1:26:28  
Question ohh no, I just think good question.

 **Jerilyn Taylor** 1:26:28  
Like I go ahead, Kaley.  
OK, so like I said, this is the second time we've done this.  
The first time that we've done it online, so thanks for playing with us with the breakout rooms and trying to do our little calibration game with fingers and in person, we have little signs and it was fun, but I know not everybody can be at the same place at the same time.  
So if you have my saying is if you didn't like it, tell us if you liked it, tell a friend so we thought this was good information.

 **Kaley Espindola** 1:26:56  
Each.

 **Jerilyn Taylor** 1:26:58  
Please tell there was in your department.  
We are wanting to get as much feedback as we can about this training.  
We may or may not be able to change processes.  
I know there's lots of comments and concerns and questions about the process and the rating and things like that.  
We as a department are working on some of that, that takes several years to change.  
Some of the stuff isn't going to change overnight, but for comments, questions, concerns things that you'd like to see changed on the training, please scan this little QR code before you leave the training.  
You have two minutes to scan this QR code.  
It will come up right on your mobile phone.  
You can take the training evaluation survey and let us know how we did, how you think we can do better.  
We will keep changing this training to make it as awesome as possible because we want people to be able to attend training that they find meaningful and a good use of your time, so please be honest, we won't be hurt, upset.  
Use it as your first attempt at sending critical feedback.  
I'd have those hard conversations and then once you are scanned with that QR code and you fill out that Qualtrics survey, you are free to pop off and we will stop the recording.  
Thank you guys so much for attending.

 **Kaley Espindola** 1:28:16  
I have one thing and one thing.

 **Jeanette Dias** left the meeting

 **Vanessa Ea** left the meeting

 **Kaley Espindola** 1:28:19  
There are two handouts.  
So we're gonna throw in the chat after this.  
Dude, I don't know if I missed that.

 **Jerilyn Taylor** 1:28:23  
Oh, I totally forgot.

 **Kaley Espindola** 1:28:23  
If you already did that, yeah.

 **Jerilyn Taylor** 1:28:24  
I'm sorry.

 **Kaley Espindola** 1:28:25  
So we have our rating sheet and then the calibration definitions and examples for those two.  
If you do find them helpful, but those are also be online.

 **Kendall Wehrer** left the meeting

 **Kaley Espindola** 1:28:31  
This posting this video will be posted online and available to anybody that wasn't able to attend today and like Jerilyn said, tell a friend we have another training coming up on Monday that they can still enroll in.  
So thank you everyone for your time today.  
Thanks for your participation.  
Was so great seeing people pop on and off and we hope you have a wonderful rest of your day.

 **Crista Hill** left the meeting

 **Robert Sackett** left the meeting

 **Daniel Segal** left the meeting

 **Sarah Meier** left the meeting

 **Michelle Dorne** left the meeting

 **Kimberly Guyer** left the meeting

 **Megan Mueller** left the meeting

 **Shanelle Cruz** left the meeting

 **Maja Krakowiak** left the meeting

 **Kara Carragher** left the meeting

 **Laura Austin-Eurich** left the meeting

 **Elizabeth Wyatt** left the meeting

 **Kaley Espindola** stopped transcription