

CCRIPSA Quarterly Probationary Report Supervisor's Guide

This report is an important way to provide a new employee feedback. We all like to know how we are doing, and feedback is key for retaining and growing employees. The goal is employee engagement and success.

What is the Process?

The first step is assessing the job and the performance to date. Prior to summarizing the employee's overall performance, supervisors should:

1. Review the job description and duties
2. Identify the duties that are being performed satisfactorily or higher
3. Identify the duties where performance can be improved
4. Identify behaviors (ex., interpersonal relationships, time management, communication styles, attendance, work quality) that are productive
5. Identify behaviors that can be improved

With this information in hand, it is time for next steps:

6. Complete the form
7. Share the form with Institutional Equity & Human Resources (IE&HR may elect to waive this requirement when appropriate)
8. Once feedback is received from IE&HR, meet with the employee and discuss your assessment.

Completing the Form

Overall Performance Section

1. **Making Satisfactory Progress.** An employee who is "making satisfactory progress" is fulfilling their duties and behaving productively. There still may be things to work on as they are new employees, but overall their performance is satisfactory. Keep in mind that "satisfactory" is not the same as "stellar" or "high performance." "Satisfactory" is a threshold of basic performance.
2. **Needs Improvement.** An employee who "needs improvement" is struggling with fulfilling some duties, demonstrating some unproductive behaviors, and/or not complying with a prior "plan of action." A plan of action should be created to provide the employee with the opportunity to address any performance and/or behavior areas.
3. **Employment in Jeopardy.** An employee whose "employment is in jeopardy" is struggling with performing many duties or one or more duties that are particularly essential or important. In addition, they may be demonstrating behaviors that are problematic and unproductive and/or not complying with a prior "plan of action." If the performance and/or behaviors do not warrant immediate dismissal, a plan of action should be created to provide the employee with the opportunity to address any performance and/or behavior areas.

Supervisor Action Item:

- In the space next to the assessment selection, please include brief but specific comments/examples of what they are doing well and what needs to be improved. Please put in comments/examples regardless of how you assessed their performance. Remember, this is a tool to benefit employees by keeping them informed about their progress. *Note: it does not need to be an exhaustive list of what is going well and what needs improvement.*

Setting Goals for Success Section

Supervisor Action Item:

- **Plan of Action.** If the employee's overall performance is less than satisfactory, determine and establish a plan of action that provides the employee an opportunity to demonstrate improvement. It must be possible to demonstrate compliance with the goal; use specifics and metrics as much as possible. The plan of action should include regularly scheduled follow-up meetings with the employee to discuss the status of the issues outlined.