

College Operating Procedures (COP)



Procedure Title: Performance Management
Procedure Number: 05-0309
Originating Department: Office of Human Resources

Specific Authority:
Board Policy Florida 6Hx6:5.02
Statute n/a
Florida Administrative Code

Procedure Actions: Adopted: 06/11/2024

Purpose Statement: The purpose of an effective performance management system is for employees to have a clear understanding of the work expected from them, to receive ongoing feedback regarding how they are performing relative to expectations, to identify development opportunities, and to address performance that does not meet expectations. A comprehensive performance management system empowers employees to have greater input into their personal career progression.

Reason for Procedure: FSW strives to provide an environment where all employees understand the impact their contributions have on the achievement of College goals and are provided the opportunity for ongoing personal growth. One way to accomplish this goal is through a strong performance-based, frequent feedback management program. The performance management process is continuous as we establish expectations that are clear and done in a collaborative manner. This helps to align both the supervisor and their direct reports. Provide continual coaching that is focused on the employee's strengths. Feedback should be frequent, focused, and future-oriented. Through establishment of expectations and continual coaching as mutual accountability is created between the supervisor and their direct reports. This accountability results in a working relationship that is developmental in nature, provides fair and accurate information both ways, is focused on the achievement of the department and the College, and serves to define what is expected of employees in their current position in relation to the department and College's overall goals.

Procedures:

FSW has adopted Agile Performance as the software tool to provide a transparent and accessible space for all documentation regarding performance from the supervisor's and employee's perspective.

It is expected that all supervisors will have regular meetings and conversations with their direct reports regarding performance expectations, employee development, and course correction where needed. Agile provides the tool to document these conversations. Agile consists of the following modules and the expectations regarding their use:

Module Name	Purpose	Requirements
Feedback	Feedback is the exchange of information between supervisor and a direct report. It typically includes information about a expected performance and actual	Supervisors must provide a minimum of 4 feedback sessions to their direct reports (1 per quarter) which are documented in Agile.

	<p>performance. Feedback is essentially an on-going, two-way conversation.</p> <p>While managers typically provide feedback to their direct reports, a supervisor may request feedback from other employees regarding the performance of their direct reports.</p>	<p>When feedback is requested from other employees regarding their direct reports, the direct report should be notified of the request and the results should be shared with the direct report.</p>
Check Ins	<p>The Check-in module uses the power of agile performance management to set employees up for success. Agile performance management fits the new ways in which we work—more collaborative, fast-paced, and social. It stresses constant communication and emphasizes employee development, success, and future performance rather than past accomplishments, documentation, and scores.</p> <p>Using Check-in, managers and employees collaborate. Employees and managers set check-in meetings to go over how things are going. And when used with Expectations and Feedback modules, Check-in becomes a powerful tool to set expectations and provide on-going feedback. It makes it easy for collaboration between supervisor and direct report.</p>	<p>Check-ins may be initiated by both the supervisor and their direct report. The minimum requirement is for two (2) documented check-in sessions per year, one every six months.</p>
Expectations	<p>Expectations identify what the employee will be working on in the near future and how it will be achieved.</p> <p>Employees generally initiate the expectation process, but supervisors may generate them as well. When an employee sets their own expectations, managers are notified of those expectations. A manager can edit those expectations, if needed, to align to the changing needs of the department.</p>	<p>Expectations may be utilized throughout the year to assure that direct reports are focusing on the appropriate tasks at the appropriate times.</p>
Reviews	<p>The Reviews module is an automated performance measurement tool. Managers and employees use the Reviews module to track job performance.</p>	<p>Reviews will be initiated by human resources for individuals in their six-month introductory period in the 3rd and 5th months. The majority of the College will not have annual reviews.</p>
Goals	<p>The Goals module allows for the creation and tracking of goals. Direct reports and managers can set goals. Goals can also be associated with departmental or college-wide</p>	<p>The intent of this module is to ensure that the goals set for direct reports are timely and meaningful to the work of the department/college.</p>

	<p>objectives. Goals are specific activities, tasks, or objectives that the manager and direct report create to grow and improve job knowledge, skills, and job performance. Goals are associated with a specific time period (goal period).</p>	<p>They may be short or long-term. At least one goal should be tracked in Agile for each direct report. Upon completion of a goal, another goal should be initiated.</p>
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Responsibility

- A. The Chief Human Resources & Organizational Development Officer (CHRODO) has the overall responsibility for the administration of the Performance Management Program and will ensure the fairness and efficiency of its execution by:
 - 1. Maintaining the electronic Agile System, and ensuring timely and appropriate access to the system for all applicable employees and supervisors.
 - 2. Ensuring electronic Agile forms are completed by a specified date.
 - 3. Reviewing electronic forms for completeness.
 - 4. Identifying discrepancies.
 - 5. Ensuring proper safeguard of the Agile System.
 - 6. Conducting quarterly audits to ensure compliance with requirements.

- B. The immediate supervisor of the employee will:

For New Hires/Transfers/Promotion within the Introductory Period:

- 1. Set expectations for performance during the first 2 weeks of employment by completing the Expectations Form within Agile.
- 2. Provide regular feedback or check-ins (minimum of monthly) using the Agile Feedback Form. Make sure that the employee remembers to acknowledge the check-in after it occurs.
- 3. Complete the Introductory Period Review for the third and fifth months of employment.
 - a. **Employee is performing successfully** - the supervisor completes the fifth month evaluation indicating that the employee will successfully complete their introductory period.
 - b. **Employee is not performing successfully or the supervisor has not had adequate opportunity to determine the employee’s performance across all job duties** – the supervisor may:
 - i. Place the employee on an extension of the introductory period. This extension should not exceed 90 days. Approval of the supervisor’s immediate supervisor and the Chief HR Officer is required to take this action.
 - ii. Separate the employee from employment with FSW. Approval of the supervisor’s immediate supervisor, Cabinet level executive and the Chief HR Officer is required to take this action.
- 4. Once an employee successfully completes the introductory period the supervisor will set goals for the remainder of the first year in the position. The supervisor will provide a minimum of quarterly feedback and one check-in session before the end of their first year of employment.

For Continuing Employees

- 1. Set goals and document them using the Goal module in Agile.
- 2. Set expectations (if needed) and document them using the Expectations Form in Agile.

3. Provide employees with quarterly feedback documented in Agile using the Feedback Form. Feedback should include progress on goals and expectations that have been set.
 4. Provide employees with a minimum of two (2) check-in sessions within a year, using the Check-In form in Agile. Make sure that the employee remembers to acknowledge the check-in after it occurs.
- C. Next Level Supervisor and/or Cabinet Level Executive: The Next Level Supervisor is the supervisor of the employee's immediate supervisor and has the responsibility for:
1. Assuring that supervisors who report to them understand the importance of the feedback process and the supervisor's role in holding employees accountable for their performance.
 2. Model behaviors of providing good feedback.
 3. Assures timely completion of required Forms in Agile by supervisor's reporting to them.
 4. Acts on audit reports provided by the Chief HR Officer for delinquent completion of documentation in Agile to assure departmental compliance.
 5. Complete all requirements of Section B above for their direct reports.
- D. Employees have a direct role in this process. Employees are strongly encouraged to engage with supervisors to ask for feedback or to schedule a check-in. The Agile system provides the employee with the opportunity to go in and request and schedule a check-in at any time.
1. When requesting a check-in, the employee is able to review expectations and goals as well as the ability to view all feedback provided through Agile. This allows the employee to prepare for the check-in conversation.
 2. The employee is able to reflect and add comments regarding the check-in that become part of the file.

Required training:

All employees are required to take training on the following topics:

1. Giving and receiving feedback.
2. Agile software navigation

Other:

- Agile software users will maintain civility and professionalism when communicating through the platform.
- Agile is not a substitute for in-person (face-to-face or Zoom) conversations. It is a tool to document conversations that occur between supervisors and direct reports.
- Supervisors are responsible for assuring compliance with the requirements outlined within this procedure.