

Performance Management Process – Check-In Guide

Supervisors will conduct three check-ins with employees during the year to review past and future performance. Each check-in will be completed with the employee anytime that is convenient during the months listed below.

February – May
June – September
October – January

The check-in process will open on the first of the month and will close on the last day of the month for the check-in period (i.e. May 31, September 30, and January 31). Employees will sit down with their supervisor and discuss their accomplishments, goals, areas to focus on over the upcoming months, and other possible topics. Employees should think about their accomplishments and areas of focus before the meeting so the employee and supervisor are able to have a conversation around them and complete the form together.

Notification of the check-in process opening will be sent to the supervisor upon the process opening. Reminder emails will be sent to supervisors who have tasks remaining to be completed during the last month of the performance check-in period. A notification will be sent daily to the supervisor and the department head, or City Administrator, the last week of the final month for the check-in period if a task is not completed for the check-in process. The process is not extended if a supervisor does not have a check-in with their employee during the established timeframe. Accomplishments and contributions from the missed check-in should be covered during the next check-in.

New employees will be added to the check-in process at the beginning of the next process (i.e. if an employee is hired June 10th, they will be added to the October - January process).

Supervisors can complete the check-in at any time during the four month period. Supervisors are encouraged to complete the check-ins so they are spaced apart appropriately (i.e. an employee shouldn't receive a check-in twice in a 4 week period, and then wait 7 months for their next check-in).

OUTSTANDING PERFORMANCE AWARDS PROCESS – GENERAL INFORMATION

Employees may be recommended by their supervisor/department head for an outstanding performance award. Recommendations are submitted by the supervisor/department head, but may be completed/written in conjunction with the employee. The supervisor and employee should discuss the employee's outstanding performance award preference (salary increase/PTO/bonus).

Outstanding Performance Award Options:

- Option 1: Recommendation for salary increase: percentage increase added to annual salary (applicable to those not red-circled or stepping)
- Option 2: Recommendation for bonus or paid time off (PTO).
 - Bonus - paid out as a set dollar amount (applicable to all employees)
 - Paid time off (applicable to all employees). One time allotment of paid time off.
- Combination of two of the above (ex. bonus and paid time off)

Eligibility

Regular full time non-represented employees and part time employees (who normally work 20 or more hours per week) are eligible for performance awards. Employees who had a written warning or higher during the 12 months prior to the recommendation deadline are not eligible for a performance award. Employees must be actively employed at the time of the performance disbursement. Employees who are on paid or unpaid leave due to disciplinary action by the City are not considered actively employed for purposes of eligibility.

Timeframe

Recommendations (emailed to deperehr@deperewi.gov) will be reviewed once per year. Outstanding performance award recommendations will be due between May 1st and May 31st (subject to change). The Performance Award Review Team will meet in June (subject to change) to review all performance award recommendations submitted.

Salary increases are effective January 1st of the year following the performance award review team meeting. Bonus and paid time off are awarded as soon as practical following the performance award review team meeting.

Question and Answer

- What is my responsibility as an employee?
 - Come prepared to the check-in to discuss your main accomplishments since the last check-in, provide a status of your previous goals, and ideas of goals for the next four months
- What is my responsibility as a supervisor?
 - Schedule a check-in during each performance check-in period with employees. Come prepared to the check-in meeting to discuss the questions and fill out the check-in form. Select a few additional questions to discuss with each employee. Once a year supervisors may submit recommendations for performance awards for any outstanding employees.
- How often will I be evaluated?
 - 3 times per year
- If I'm a new employee, how frequently will I be evaluated?
 - New employees will have their first check-in during the check-in period that begins following their date of hire (i.e. if an employee is hired June 10th, they will be added to the October - January process). Your supervisor may choose to have more informal check-ins.
- What time period will the check-ins cover?
 - Looking back since your last performance check-in
- When will I meet with my supervisor?
 - The supervisor will schedule a meeting with each employee sometime during each performance check-in period that is convenient for the employee and supervisor
- Will I be provided a rating?
 - No, ratings are no longer provided; just written feedback
- Are there performance awards?
 - Yes, the same award options exist

- What are the types of performance award options?
 - Bonus, paid time off, and/or salary increase
- Can employees nominate each other?
 - No, recommendations will be submitted by the supervisor and/or department head
- When do supervisors recommend employees for a performance award?
 - Between May 1st and May 31st each year (date subject to change); the HR department will be reminding supervisors of this
- Who is eligible for a performance award?
 - Non-represented employees who normally work 20 or more hours per week, as long as they have not been disciplined with a written warning or more during the 12 months prior to the recommendation deadline
- Will I know if my supervisor/department head is recommending me for a performance award?
 - It will be up to the supervisors/department head if they would like to inform the employees they are recommending
- Can I select my preference for the type of performance award I'm interested in?
 - Yes. As part of the first check-in process of the year your supervisor should be asking you your preference.
- Will my supervisor get to select their preference for my performance award?
 - Yes. Supervisors will determine if they are recommending you for a salary increase or a bonus/paid time off. You will get to list your preference between bonus or paid time off. If you are recommended for a salary increase, you will be able to list your preference of salary increase or paid time off.
- Who determines if I receive a performance award?
 - The Pay for Performance Review Team (which includes the City Administrator and at least two supervisors from an outside organization)
- If I am awarded a bonus or time off, when do I receive it?
 - As soon as practical following the Pay for Performance Review Team meeting
- If I am awarded a salary increase, when do I received it?
 - Increases are effective January 1st of the year following the Pay for Performance Review Team meeting
- Can the City Council deny my salary increase that is approved by the Performance Award Review Team?
 - The City Council determines the final budget for the various programs; however, current policy does not allow the Council to adjust individual employee compensation amounts
- As an employee can I see the completed check-in form?
 - Yes, the completed check in form will be available for employees to view from the evaluations section of Halogen
- I discussed goals with my supervisor at my check-in. Will I see those anywhere?
 - The goals you discussed with your supervisor will be on your performance check-in form. Beginning with the June – September 2022 process you will also see the goals on your goals page in Halogen.



City of De Pere Performance Check-In

Employee Information

Name:

Manager:

Job Title:

Department:

Check-In Date:

Accomplishments, Contributions, and Responsibilities

List 2-3 of the employee's most important accomplishments, contributions, or responsibilities since their last check-in.



Past Goals or Suggestions for Process Improvement

Past Goals or Suggestions for Process Improvement

Discussion/Status



 Add Past Goal



New Goals or Suggestions for Process Improvement

Identify 1 – 2 goals to work on during the next check-in period or provide any ideas the employees has for process improvement. Process improvement ideas may be within the department, in another department, or for the City overall. Goals may be related to work projects, soft skills, etc. Examples of soft skill goals may include:

- Being a positive team member
- Speak up and contribute in department meetings or during a specific project
- Pause and listen to what someone is saying before responding
- Help others achieve tasks to complete overall project
- Be proactive in sharing knowledge, skills and expertise with other team members

Goals



 Add New Goal


ABC 

Identify an area of opportunity or improvement to focus on.

Areas of opportunity or improvement may be short-term or long-term. They may focus on gaining additional knowledge, improving a soft skill, etc.

Employees and supervisors are encouraged to each identify at least one area of opportunity or improvement.

Employee's Comments	Supervisor's Comments

ABC 

Additional Topics of Discussion

Additional Topics of Discussion

We suggest you ask additional topics for further discussion with your employee. You can use the sample questions listed below, or other questions that you feel would be beneficial to discuss with your employee. You can add notes about the discussion below.

- What would you like to be different in your workplace?
 - What are you willing to do get these things, or what solution do you suggest?
- What teams are you part of and how do you contribute to them?
- What teams are you on that you don't want to be? What teams would you like to join?
- What are your long-term career goals?
- What might be an area for development that would allow you to perform more effectively?
- What type of support or assistance would help you to do your job better?
- What could I start or stop doing to help you achieve your goals?
- What skills or talents do you have that you aren't using often enough in your work today?
- If you could make one positive change to the department or the City what would it be?
- How do you like to be recognized/rewarded?
- What do you enjoy about your job/work?
- What do you look forward to each day when you commute to work?
 - Follow up questions may include
 - Give me an example
 - Tell me more about...
 - Who do you look forward to working with the most?
- What are you learning here, and what do you want to learn?
 - Follow up questions may include:
 - Which other jobs here look attractive to you?
 - What skills do you think are required for those jobs?
 - What skills would you have to build to attain those jobs or some responsibilities of those jobs?
- What keeps you at the City?
 - Follow up questions may include:
 - Tell me more about why that is so important to you.
 - Is that the only reason you stay or are there others?
 - If you narrowed your reasons to stay to just one, what would it be?
- When is the last time you thought about leaving us, and what prompted it?
 - Follow up questions may include:
 - Tell me more about how that happened. Who said what?
 - What's the single best thing I can do to make that better for you?
 - How important is that to you now on a 1-10 scale?
- What can I do to make your job better for you?
 - Follow up questions may include:
 - Do I tell you when you do something well?
 - Do I say and do things to help you do your job better?
 - What are three ways I can be a better leader for you?



Employee Performance Award Options Preference (Complete only for February - May check-ins)

A Performance Award Review Team consisting of the City Administrator and two other outside supervisory personnel will review all outstanding performance award recommendations and decide which employees should be rewarded with the award. In the event you are recommended for an outstanding performance award, please identify your preference for the award.

If your supervisor recommends you for a performance award, your supervisor will identify if they feel a salary increase is warranted or a bonus or paid time. The Performance Award Review Team will take into consideration your supervisor's recommendation and your preference; however, there is no guarantee.

Supervisors may or may not inform employees if they are recommending an employee for a performance award. It is up to the supervisor's discretion.

Preference Options:

Salary Increase (please note: this option is not applicable to employees stepping or at the pay grade maximum)

Paid Time Off

Bonus

1st Preference

2nd Preference

3rd Preference



Check-In Guide for Supervisor

Supervisors will conduct three check-ins with employees during the year to review past and future performance. The check-in process will open on the first of the month and will close on the last day of the month for the check-in period (i.e. May 31, September 30, and January 31). Notification of the check-in process opening will be sent to the supervisor upon the process opening. Employees will sit down with their supervisor and discuss their accomplishments, areas to focus on over the upcoming months, and other possible topics.

Supervisors can complete the check-in at any time during the four month period. Supervisors are encouraged to complete the check-ins so they are spaced apart appropriately (i.e. an employee shouldn't receive a check-in twice in a 4 week period, and then wait 7 months for their next check-in). To help build the relationship with a new employee, supervisors are encouraged to take the new employee out to lunch twice during their first year of employment with the City. Lunch will be paid for by the City from the sundry account and should fall within City's policy for meal reimbursement.

The City uses Halogen for the check-in process. Below is information you might need to get started.

Using your Halogen Home Page

<https://global.hgncloud.com/cityofdepere/welcome.jsp>

Your Halogen Home page highlights everything you need to manage your own performance and your employee's performance. You can stay on top of your goals, development plans, tasks to complete, and feedback (goals, development plans, and feedback are optional features that supervisors may choose to use). Easily keep yourself on track by updating activities, completing tasks, preparing for performance conversations and sharing feedback - all from your personalized dashboard view.

Note: Use the Navigation Bar to go to the areas of the site. Using the browser's Back button could result in lost data.

Performance Check-in Task

Performance check-ins with your employees consists of meeting with the employee and completing the check-in form within Halogen. All your tasks (Check-Ins) appear at the top of the Home page.

To open a task, click the **tile** and the task window will open. From there, click the link (Edit Appraisal) under the Task column. When meeting with the employee, you should enter notes on accomplishments and contributions, goals, opportunities, and additional topics of discussion. Please remember that employees will have access to a copy of the completed form.

Please see the next page for tips and tricks from Halogen on working with forms.

Once all tasks are complete, you can view your employees' completed forms in the Past Evaluations section in My Employees.





Additional Information





Please see the compensation section of the City of De Pere Employee Policy Manual for the full compensation policy, including step movement, yearly adjustment, and pay for performance.


Working with a form

Some of the features available as you work with a form are described here. The icons are explained below.


Form Navigator




Printing or Saving as PDF

Click the **Print** icon, , and then choose either XPS printer, PDF generator, or regular print.


When printing a hard copy:

- In the popup window, select **Normal Print** or **Condensed Print**.
- To keep sections together on a page, deselect **Allow Sections to break across pages**.
- Click **OK** when finished.

Check Spelling

Click the **Check Spelling** icon, , to check the entire form for spelling mistakes. Note: The Check Spelling icon also appears in sections within the form and allows you to check spelling for individual sections.

Check Language

The Check Language tool, , will flag words that may be offensive and offer suggestions for replacement words; such as replacing the word "lazy" with "unmotivated".

Using the Split Screen

With an employee's form open, use the split screen to view Employee Records such as goals, development plans, feedback, and past appraisals.

- Click the **Split Screen** icon.
- From the dropdown, select the item that you want to display. The split screen window will open at the bottom of the form. Copy and paste information directly into the form, if desired.
- Click the **X** to close the split screen.

Saving vs. Completing

Depending on your role and the current step in the workflow, the buttons at the top of the form may vary.

- Click **Save** if you want to save a draft and return later to add additional content.

You are encouraged to save your work on a regular basis. If no activity has been detected for a certain period of time, the system will warn you of inactivity. You will get a message asking if you would like to continue working. If no action is taken when the message displays, you will be logged out and will lose any unsaved work.

- Click **Complete** only when you are finished the form and are ready to move to the next step in the process.

Once you select Complete, you will no longer be able to edit the form without contacting your Halogen Administrator.