

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.

April – May

August – September

December – 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 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, if there are check-ins that are not completed by the due date; these notifications will be sent for one week, or until the check-ins are completed. 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 May 10th, they will be added to the August - September process).

Supervisors can complete the check-in at any time during the two-month period. Supervisors are encouraged to complete the check-ins so they are spaced apart appropriately.

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

Benefit-eligible non-represented 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

Check-In Process

- What is my responsibility as an employee?
 - Come prepared to the check-in to discuss your main accomplishments since the last check-in, what is going well, what could improve things at work, an update of the teams you participate in, 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 meet with my supervisor for a check-in?
 - 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 May 10th, they will be added to the August - September 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

- As an employee can I see the completed check-in form?
 - Yes, the completed check in form will be available for employees to view in Halogen. Once logged into Halogen, employees should choose “Archives” to view past check-ins.
- 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 and on your goals page in Halogen.

Pay for Performance

- Are there performance awards?
 - Yes
- 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 receive 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



**City of De Pere
Performance Check-In**

Employee Information

Name:

Manager:

Job Title:

Department:

Check-In Date:

What accomplishments or contributions are you most proud of since your last check-in?



What's going well with work?



What could improve things at work?



City Teams Update

Please provide an update on the different teams you've been involved with since your last check in and share any notable achievements or insights gained from your participation. Are there teams you are on that you don't want to be on? Are there teams would you like to join? (If the employee is not on a team, talk to the employee about joining a team.)

Past Goals

Past Goals	Discussion/Status
 	

 Add Past Goal

New Goals

Identify 1 – 2 goals to work on during the next check-in period. 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

Identify an area of opportunity or improvement to focus on.

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ABC  

Supervisor's overall feedback on employee's performance.

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ABC  

Is there anything that you need from me?

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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 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. Supervisors will sit down with their employees and discuss the employee's accomplishments, what is going well, what could improve things at work, an update of the team participation, status of previous goals, ideas of goals for the next four months, areas to focus on over the upcoming months, the supervisor's overall feedback and other possible topics.

Supervisors can complete the check-in at any time during the two-month period. 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, based on the dinner rate. Please note, the rate includes tax and tip.

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 for all discussion areas. Please remember that employees will have access to a copy of the completed form.

Once you have completed the check-in with the employee and all your notes are entered, click on complete – this will save and submit the check-in form. If you are not able to enter all your notes during the check-in and need to come back to it at a later time, you should click on save; this will save your changes but not submit the 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 My Employees section of Halogen.

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.

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