

# Supervising Staff: How to Effectively Manage Performance

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# 1. Why Is It Important?

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- Prevent litigation
- Increase productivity
- Enhance morale

## 2. Steps for Managing Performance

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- ❑ Establish and communicate expectations
- ❑ Document performance throughout the year
- ❑ Document disciplinary actions throughout the year
- ❑ Treat employees consistently

# 3. Document, Document, Document

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- ❑ Document completion of and failure to complete tasks
- ❑ Document meetings with employees
- ❑ Document meetings with others about employee's performance

# Document, Document, Document

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- Document compliments and criticism from others about employee's performance
- Document formal disciplinary actions and follow-ups
- Use documentation to help draft annual performance evaluation

# 4. Preparing the Performance Evaluation Form

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- Give examples
- Record good and bad performance
- Do evaluations on time
- Confirm negative behavior that you did not observe first-hand
- Make sure evaluator has had enough time to observe employees being evaluated

# 5. Discussing the Performance Evaluation With Employee

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- ❑ Prepare by anticipating reactions and questions
- ❑ Bring a witness, if necessary
- ❑ Think about whether employee may be entitled to bring a witness
- ❑ Discuss the evaluation thoroughly, but do not argue
- ❑ Allow rebuttal, if necessary

# 6. What To Do If Nothing Else Works

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- Contact Human Resources for on-going advice and assistance with local level investigations
- Contact Ombudsman for mediation services
- Ask UCIRO to conduct an investigation