



**Indian Rocks**  
CHURCH + CHRISTIAN SCHOOL

# **Supervisor 101**

Performance Management Basics





## Overview

- Types of Performance Communication and Feedback
- Demo- Paylocity Journals for performance documentation
- Coming soon!
- HR Housekeeping



## Types of Performance Management

- Recognition- Identifying and celebrating a strength
  - Communicating what good looks like
- Constructive Feedback- Identifying an opportunity
  - The Redirect- Remember, everyone's behavior is reasonable from their point of view, at least in that moment. It is your job to identify when it is not reasonable and quickly redirect it
- Progressive Performance Counseling
  - Identifying a serious issue- Safety or integrity issues
  - Identifying patterns or repetitive issues
    - These should not be a surprise, we should be having and documenting leading conversations.
    - Accountability is expected to come out of these conversations
      - Action items



## Performance Counseling BEST Model

Framework for conversations- BEST

**B**ehavior- Specific observed behavior and the impact of that behavior.

Identifying the Behavior and Clarifying the cost

**E**xpectation-Reference a policy, procedure or specific expectation

Job description, Handbook Policies, SOP

**S**olicit Input- Ask them why

Were you aware....? What was your thought process?

**T**alk next steps- Detail an action plan to correct the behavior with Check-ins,

Re-set expectations

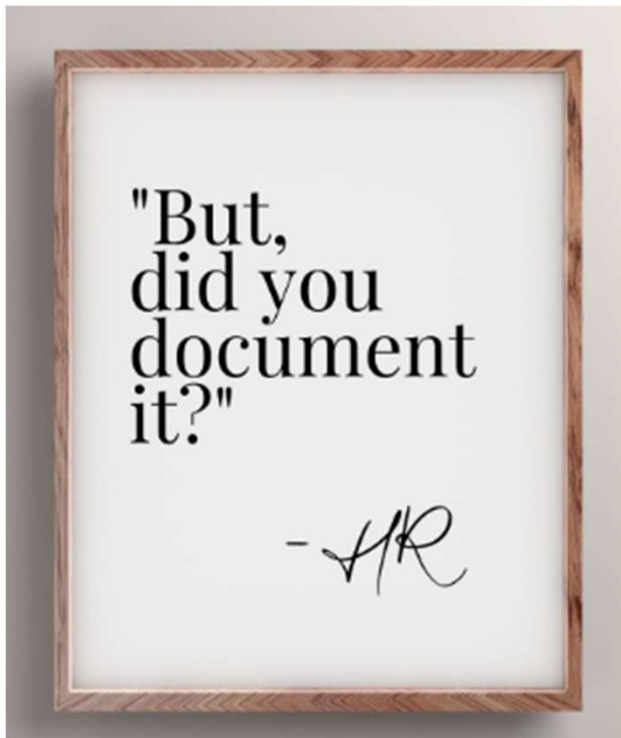


## Journals in Paylocity- In performance tab

- Notes- general notes and quick conversations
  - First time offenders
  - Used to remind yourself of conversations you are having or things you are seeing
- Above and Beyond- for employee recognition
- One-on-One-sit down conversations
  - They can be used to show progressive action that will lead to PC
    - Repetitive reminders or to help identify patterns
- Development plan- For constructive performance counseling
  - Already Laid out in BEST format
  - Serious issues that require a formal conversation with a plan to improve



## Documentation and follow-up



### Regular use of journals will create a better overall communication culture for everyone

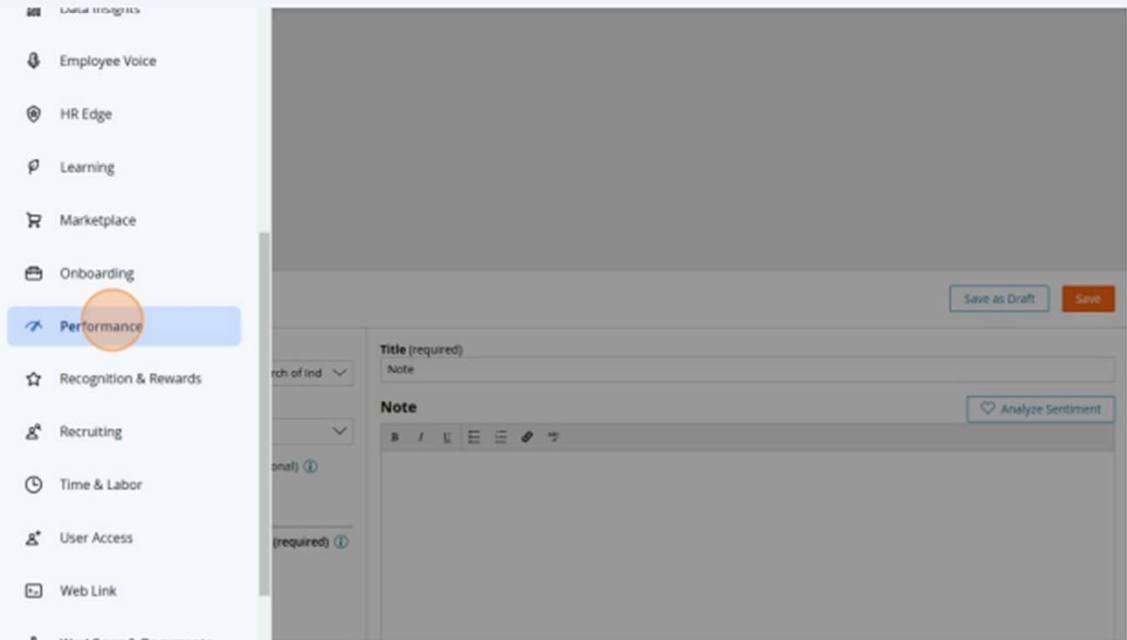
- Development Plans-Performance Counseling documentation should be created before you have the conversation
  - This is the framework or outline of your conversation to keep you on track
  - Clear, concise, and without emotion, bring it back to the individual and their behavior
- Recognition documentation can be done on the fly, or after the fact, The App is your friend!
  - Don't forget! Recognition is SO important
- If you schedule a check-in, make sure you follow through.
  - Make sure to also communicate that it will happen so they are not left feeling anxious
- I am here to support you! I am happy to review documentation or communication, sit in on awkward conversations, or schedule individualized training with any of you!



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## Paylocity Demo

1 Click "Performance"





## 2 Click "Create Journal"


**Talent Summary**

Team Activity, Last 90 Days

Journal Entries (0% of team)	Feedback Received (0% of team)	Goals Added (0% of team)
0	0	0

Search for an employee  Active

Active Filters: Employee Status: Active X Supervised Employees: Direct Reports X

Employee	Rating	Tenure	Journals	Feedback	Active Goals	Completed Goals	Actions
							
Sorry, we couldn't find any results. Try modifying your criteria.							





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Use the Note template for general notes. This can be things you see and don't want to forget. Things a direct report may have said to you or a conversation you had that seemed important. This can be private, or shared.

< New Journal Save as Draft Save

**Journal Company**  
(192416) First Baptist Church of Ind

**Journal Template**  
Note

**Make Journal Private** (optional) ⓘ  
☐

**Who is this journal about? (required)** ⓘ  
☐ Me ☒ Someone else

Add About Person(s)

**Share this journal with About Person(s)**  
☐

**Contributor(s)**  
Journals are automatically shared with the direct supervisor of the About person(s). They can be viewed by HR administrators and managers within the person(s) direct

**Title (required)**  
Note

**Note** Analyze Sentiment

**Keyword Tags**  
Keywords

**Attachments**



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For recognition, select "Above & Beyond." This will break down into 3 sections to add notes: serving others, leading by example, or encouraging others. Share that with the person(s) it is about.

< New Journal Save as Draft Save

Journal Company  
(192416) First Baptist Church of Ind

Journal Template  
Above & Beyond

Make Journal Private (optional) ☐

Who is this journal about? (required)  
☐ Me ☒ Someone else

Add About Person(s)

Share this journal with About Person(s)  
☒

Title (required)  
Above & Beyond

The **Above & Beyond Journal** is a way to recognize employees who go the extra mile in their work. Supervisors can use this entry to highlight outstanding contributions, exceptional teamwork, or moments where an employee exceeded expectations—whether or not they are a direct report.

- **Serving Others** - Helping beyond expectations with a heart of service.
- **Leading by Example** - Taking initiative and inspiring others through actions.
- **Encouraging Others** - Uplifting and supporting coworkers, students, or church members.

**Serving Others** Analyze Sentiment



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The "Development Plan" Template should be used for Performance counseling. This is meant for in person performance counseling conversations. The "Coaching Focus" drop down will have options for Behavior, Expectations, Skill development, or other.

**Journal Template**  
Development Plan

**Make Journal Private** (optional)

**Who is this journal about?** (required)   
☐ Me ☒ Someone else

[Add About Person\(s\)](#)

**Share this journal with About Person(s)**

The **Development Plan** is a structured tool designed to clarify expectations, provide targeted support, and track progress in key performance areas.

**Coaching Focus**  
Identify the key area for coaching and development.  
Behavior

**Key Areas for Improvement**   
Outline the specific behaviors, skills, or performance gaps that need improvement.

**Define Expectations**   
Define the specific expectations and standards the employee is expected to meet.





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**Expectation-** Define the specific expectation or policy and where to find it. For example, when referencing an issue with a teachers behavior, you could copy and paste the expectation written in their teacher agreement or handbook with page or section numbers

The screenshot shows a web application interface with a light blue background. On the left is a vertical grey sidebar. The main content area is divided into two sections. The top section is titled "Define Expectations" and includes a sub-header "Define the specific expectations and standards the employee is expected to meet." Below this is a text input area with a rich text editor toolbar (bold, italic, underline, list, link, unlink, image, video) and a large orange circular placeholder. To the right of the title is a button with a heart icon and the text "Analyze Sentiment". The bottom section is titled "Employee Input" and also features a rich text editor toolbar and a button with a heart icon and the text "Analyze Sentiment".



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**Solicit input-** Ask why or what lead them to their choice. You can add notes in this section to clarify what they have to add to this conversation, but always be sure to direct them back to the issue you are discussing and don't allow them to derail the meeting. This is not an invitation for them to identify what they think are other areas of concern.

The screenshot displays a digital form interface with a light blue header and a white body. On the left, there is a vertical grey bar. The form is divided into two main sections. The top section is titled "Employee Input" and contains a large text area with a vertical cursor and a small orange circle. To the right of this section is a button labeled "Analyze Sentiment". The bottom section is titled "Next Steps" and contains a smaller text area with a vertical cursor. To the right of this section is another button labeled "Analyze Sentiment". Both sections have a toolbar with icons for bold, italic, underline, list, link, and unlink.



## Coming soon-Bringing it all together

- Goals in paylocity
  - Updated and trackable feedback that will tie into review process
- New feedback and review process
  - Journals will be able to tie in to this
- New updated employee handbook that will tie into paylocity