



Human Resources

SUPERVISOR MEETING

August 20, 2026

From Feedback to Action

1 | Assess

Use evidence to confirm the employee's current performance and development needs.

2 | Adapt

Select the leadership approach that best fits the employee and the work in front of them.

3 | Communicate

Use SBI4 to turn observations into clear, growth-oriented feedback.

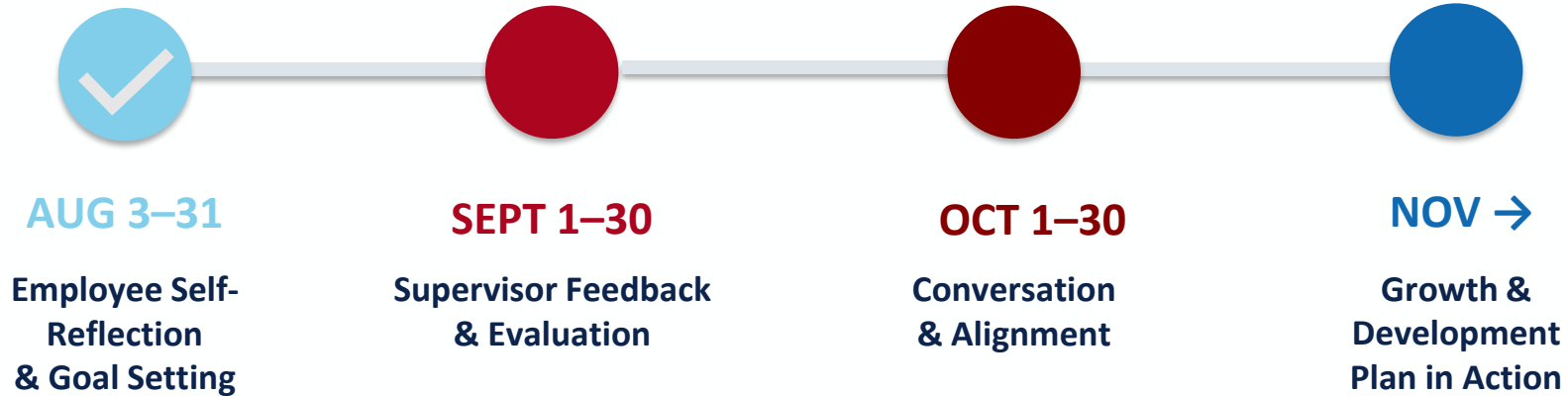
4 | Prepare

Plan for the conversation before you enter the meeting.

The goal is not a perfect script. The goal is a clear, evidence-based conversation that leaves the employee knowing what happened, why it matters, and what comes next.



Where We Are in the Career Conversations Cycle



The Three-Step Connection

1 | RATING

A snapshot of performance based on observed behaviors, outcomes, impact, and examples—not assumptions, preferences, or isolated moments.



2 | LEADERSHIP APPROACH

Use Situational Leadership to decide how much direction, support, autonomy, and empowerment the employee needs.



3 | FEEDBACK

Use SBI4 to make the message specific, objective, meaningful, and actionable.

What evidence supports the rating?

Consider:

What does this employee need from me next?

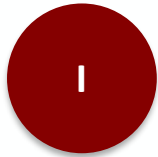
Which examples will make the feedback concrete?

What do I want the employee to understand, feel, or do differently?



SBI4 Feedback Model

Create a two-way conversation: invite, clarify intent, describe, connect impact, and inquire.



INVITE

Open the conversation and invite the employee into dialogue.



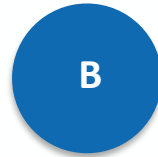
INTENT

Explain why you are having the conversation.



SITUATION

Name the specific context or moment.



BEHAVIOR

Describe observable actions.



IMPACT

Explain the effect on people, work, or outcomes.



INQUIRE

Ask for perspective, reflection, and next steps.

The sequence moves from opening the dialogue → framing the purpose → describing what happened → connecting the impact → inviting the employee's perspective.

If you cannot point to the observable behavior, pause before giving the feedback.



Human Resources

SBI4 Positive Feedback

Invite + Intent + Situation + Behavior

“I want to highlight one of the strengths I’ve seen from you repeatedly over this review period because it has had a meaningful impact on both the team and the quality of your work.

Throughout the year, when you’ve presented recommendations to leadership, you consistently came prepared data-driven recommendations, anticipated questions, and adjusted your communication based on the audience.

Impact + Inquire

“As a result, leaders were able to make decisions more efficiently, and your recommendations frequently moved forward with strong support. What do you think helped you be successful in those situations, and how could you continue building on that strength in the coming year?”



SBI4 Constructive Feedback

Invite + Intent + Situation + Behavior

“I want to spend some time discussing your follow-through on project commitments because meeting agreed-upon deadlines is an important expectation of your role and helps the team deliver its work effectively. Over the past several months, including our quarterly reporting cycles, there were multiple instances where assigned deliverables were submitted after the deadline and I often needed to follow up before receiving an update.

Impact + Inquire

“As a result, some dependent work had to be adjusted, and other team members had less time to complete their portions of the work. What factors have contributed to those missed deadlines, and what changes do you think would help you manage those commitments more consistently going forward?”



Adapting SBI4 to Leadership Styles

FLEX THE DELIVERY

DIRECTING

Be explicit

Invite + Intent: “I want to talk about this because it affects an important expectation.” Then state the situation, behavior, impact, and clear next step. Inquire: “What questions do you have?”

COACHING

Explain & Partner

Invite + Intent: “Can we talk through what happened and how we can strengthen this?” Then describe the situation, behavior, and impact. Inquire: “What do you think contributed to it, and what will you try differently?”

SUPPORTING

Ask & Empower

Invite + Intent: “I’d like to get your perspective on something I noticed.” Then describe the situation, behavior, and impact. Inquire: “How do you want to approach this, and what support would be useful?”

DELEGATING

Reflect & Trust

Invite + Intent: “I want to share an observation and hear your perspective.” Then describe the situation, behavior, and impact. Inquire: “What do you see, and what will you do with it?”

Important: Do not change the facts to fit the style. Change how much direction, support, autonomy, and dialogue you provide.



Writing Meaningful Feedback

Describe the Contribution

What did the employee do? Use concrete examples rather than simply listing responsibilities.

Explain the Impact

Why did it matter? Connect the work to the team, customer, project, unit, or institutional outcome.

Clarify What Comes Next

What should continue, change, or grow? Give the employee a useful direction for the next review period.

Instead of: “Jordan did a good job managing the project.”

Try: “Jordan coordinated the project across three partners, resolved timeline risks early, and kept milestones on track. This helped the team deliver on schedule. Going forward, I’d like Jordan to take greater ownership of stakeholder planning at project launch.”



Fairness in Ratings

Compare Standards, Not People

Ask whether similar levels of performance are being evaluated using similar expectations. Avoid ranking employees against one another.

Check Your Patterns

Are you unusually generous or strict? Are some employees receiving more benefit of the doubt? Look for recency, halo, similarity, and leniency effects.

Pressure-Test the Evidence

Could another leader understand why the evidence supports the rating? Where appropriate, use leadership/HR discussions to test consistency.

Calibration question: If two employees demonstrated comparable performance against comparable expectations, would I evaluate them consistently?

Calibration strengthens fairness; it should not be used to force a distribution of ratings.



Managing Difficult Conversations

Stay Grounded

Return to specific evidence, behaviors, outcomes, and expectations. Avoid debating motives or character.

Slow the Conversation Down

Pause. Listen fully. Acknowledge the employee's perspective without immediately defending the rating.

Keep the Purpose in View

The goal is understanding and alignment—not winning the conversation. Clarify what is settled and what still needs follow-up.

Consider: **“I can hear that you see this differently. I want to understand your perspective. Walk me through the examples you’re considering.”**

Then return to the evidence and expectations—not the emotion of the moment.



Aligning Expectations

1 | LISTEN

Use Inquire. Ask what the employee sees differently and what evidence they are considering. Listen without interrupting or immediately rebutting.

2 | CLARIFY

Restate the expectations, rating criteria, and evidence supporting the assessment. Correct misunderstandings without becoming defensive.

3 | ALIGN

Confirm what success looks like going forward: priorities, behaviors, milestones, support, ownership, and follow-up cadence.

Respectful disagreement sounds like:

“We may not leave with the same interpretation of every example, but I want to make sure we leave with the same understanding of the expectations and what success looks like going forward.”



EDGE LEARNING DEMO



Q&A

Thank you!

Contact Info: hr-learnanddevelop@arizona.edu



Human Resources

Assess and Adjust

DIRECTING

Clear expectations
Close supervision
Frequent check-ins

COACHING

High guidance + support
Frequent feedback
Build capability + confidence

SUPPORTING

Shared decisions
Encourage ownership
Focus on development

DELEGATING

High autonomy
Minimal oversight
Stretch + influence

STEP 1 — ASSESS

Competence: Does the employee have the skill/knowledge for this specific task?
Commitment: How motivated and confident are they about doing it?

STEP 2 — ADJUST

Choose the amount of direction, support, autonomy, and empowerment that fits the employee and the task right now.

**Remember: the same employee may need different styles for different tasks.*



Practice Scenario

Jordan consistently meets expectations on core responsibilities. They have strong technical skills, but they have asked for more opportunities to contribute to cross-team initiatives and have started proposing process improvements without being asked.

What does Jordan most likely need from the supervisor?

A

More detailed instructions and daily check-ins

B

Frequent coaching and step-by-step feedback

C

More ownership, trust, and opportunities to influence

D

A formal corrective action plan

Best fit: C — Supporting/Delegating depending on the scope of the work.



Situational Leadership and Employee Engagement

MATCHING STRATEGIES TO EMPLOYEE NEEDS

DIRECTING	COACHING	SUPPORTING	DELEGATING
<i>Best fit: new/inexperienced & Developing</i>	<i>Best fit: Evolving</i>	<i>Best fit: Meeting (steady, could engage more)</i>	<i>Best fit: Exceeding & highly capable Meeting</i>
Engagement Strategies: - Set clear, measurable expectations - Increase check-in frequency - Document guidance and progress	Engagement Strategies: - Explain the “why” behind expectations - Give specific, frequent feedback - Partner on problem-solving	Engagement Strategies: - Recognize consistent contributions - Increase autonomy gradually - Involve them in decisions	Engagement Strategies: - Provide autonomy and stretch work - Stay available but do not micromanage - Create broader influence opportunities
Outcome: <i>Your clear instructions and close supervision build the foundation a new or Developing employee needs to reach a Meeting rating.</i>	Outcome: <i>Your high guidance and frequent feedback build the capability and confidence an Evolving employee needs for a Meeting rating.</i>	Outcome: <i>Your shared decision-making and focus on development help a Meeting employee feel valued and stay engaged toward Exceeding.</i>	Outcome: <i>Your high autonomy and minimal oversight keep a highly capable, Exceeding employee engaged by showing trust.</i>



5 Scale Ratings

Rating	Description
Exceeding	Employee meets goals and frequently surpasses expected outcomes. Work positively impacts the organization beyond the immediate team level.
Meeting	Staff consistently meets goals on time and delivers expected outcomes. Work positively impacts the organization at the team level.
Evolving	Staff partially meets goals. Opportunities were identified to meet expectations or milestones, but actions were inconsistent or incomplete.
Developing	Staff does not meet goals. Key milestones were not reached and limited progress was demonstrated during the review period.
Not Measurable	Performance cannot be fairly evaluated during this review period due to the limited time in role, extended leave or other approved circumstances outside of the staff's control.



From Feedback to Action

August 2026



Career Conversations Timeline



Ratings Defined & Applied



Situational Leadership Framework



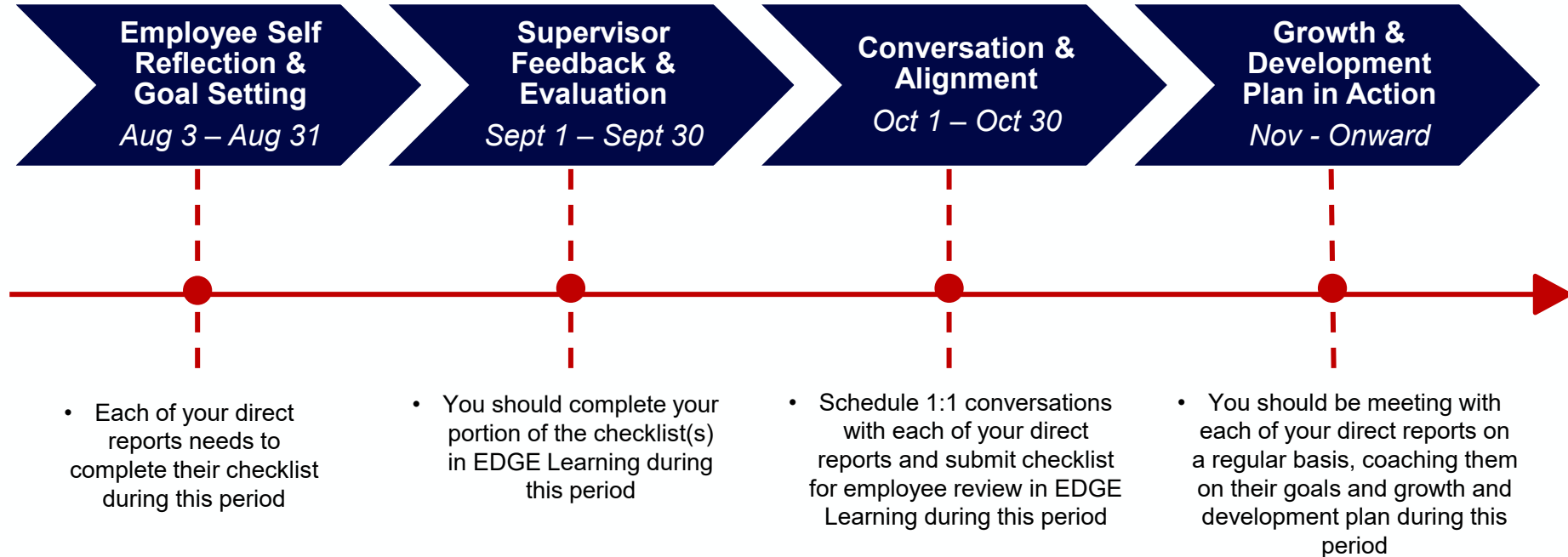
Career Conversations Supervisor Resources



Q&A



Career Conversations Timeline



Influences on a Team's Performance

You Might Struggle With:

- Fear of conflict
- Desire to maintain relationships
- Concern about employee reactions
- Lack of confidence in feedback conversations

Impacts of Leniency:

- Reduces credibility
- Creates inequities
- Limits development opportunities
- Creates future employee relations concerns

Within Your Direct Control:

- Clarity of expectations
- Sense of progress and achievement
- Connection to purpose and meaning
- Employees feeling heard and valued
- Understanding their role in the bigger picture



Coaching vs Corrective Action

Coaching:

- Growth
- Skill development
- Improving future performance
- Building capability

Examples:

- Providing feedback
- Offering resources
- Discussing career aspirations
- Identifying development opportunities

Corrective Action:

- Addressing performance concerns
- Clarifying expectations
- Documenting deficiencies
- Formal accountability



Aligning Ratings to Your Leadership Approach

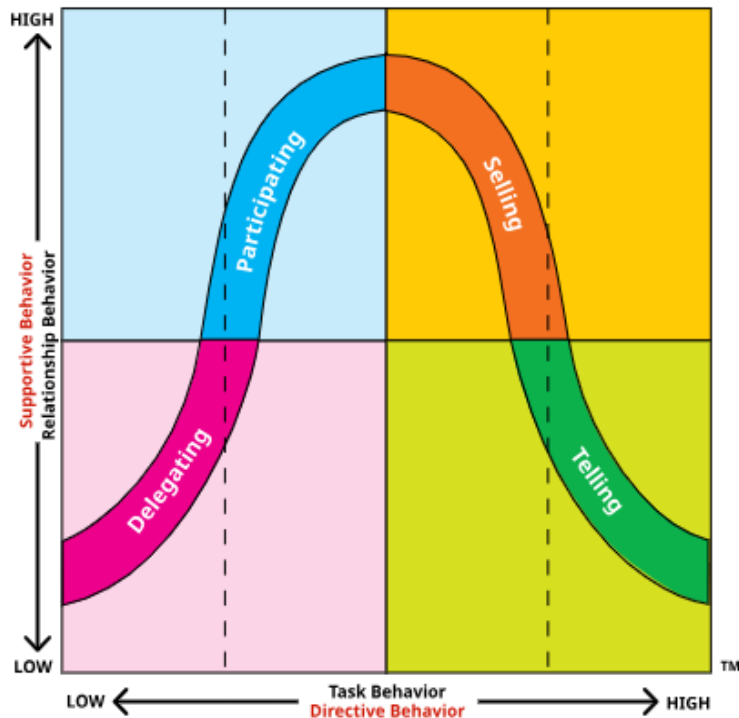
MATCHING STRATEGIES TO WHERE EACH EMPLOYEE STANDS TODAY

5-Scale Rating	Competence & Commitment	Leadership Style	What You Can Do
Exceeding	High competence, high commitment	Delegating	• Assign cross-team or strategic projects • Invite into planning & key decisions
Meeting	Solid competence, consistent commitment	Delegating	• Hand off a full project, start to finish • Recognize contributions publicly
		Supporting	
Evolving	Developing competence, variable consistency	Coaching	• Weekly check-ins with clear milestones • Pair with a peer mentor
		Supporting	
Developing	Limited competence, low/variable commitment	Directing	• Set written 30/60/90-day goals • Document biweekly progress check-ins
		Supporting	
Not Measurable	Insufficient data to assess	Directing (new to role)	• Build a structured 90-day onboarding plan • Schedule regular check-ins to gather evidence

Note: Directing applies to two distinct situations: a new or inexperienced employee building foundational skills (often Not Measurable), and a tenured employee with a specific skill or consistency gap (Developing). The style is the same; the underlying reason is different and should shape your conversation.



Source: Hersey, P., & Blanchard, K. H. (1977). *Situational Leadership*. Center for Leadership Studies
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Leading for Growth:

SITUATIONAL LEADERSHIP MEETS CAREER CONVERSATIONS

What We Know:

- Effective supervisors adapt their leadership style to each employee's competence and commitment.
- The new ratings system provides shared, evidence-based language for where an employee currently stands.
- We must now connect that language to how you lead, coach, and support each person.



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The Situational Leadership Model

STEP 1 | ASSESS: Competence (skill for this task) & Commitment (motivation & confidence)

STEP 2 | ADJUST YOUR STYLE

DIRECTING

- Clear instructions
- Close supervision
- Appropriate for new or inexperienced employees

COACHING

- High guidance and support
- Frequent feedback
- Building capability and confidence

SUPPORTING

- Shared decision-making
- Encouraging ownership
- Focus on development

DELEGATING

- High autonomy
- Minimal oversight
- Appropriate for highly capable employees

A note on Directing: style depends on competence for this specific task, not tenure. Both a brand-new employee and a tenured employee facing an unfamiliar task may need Directing for different reasons.

Source: Hersey, P., & Blanchard, K. H. (1977). Situational Leadership. Center for Leadership Studies



Career Conversations 26-27-UAT

In Progress

Assigned To
Wilma Wildcat

50%

Due on: 11-OCT-2026 (90 days remaining)



Wilbur Wildcat

REQUEST EVALUATION



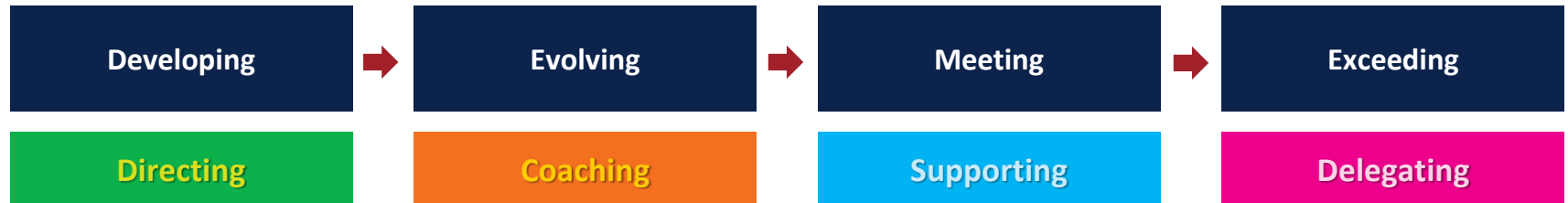
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Career Conversations & Beyond

WHY THIS FRAMEWORK MATTERS IN EVERY CONVERSATION

- Not every employee requires the same feedback approach.
- Development conversations should reflect where employees are in their growth journey.
- Supervisors should adapt coaching style to employee needs.

THE GROWTH JOURNEY, IN ONE VIEW



Source: Hersey, P., & Blanchard, K. H. (1977). Situational Leadership. Center for Leadership Studies





Career Conversation - Checklist 26-27 UAT - v2

Pending Registration

Due date: 30-OCT-2026 | *109 days remaining*

[VIEW DETAILS](#)



Career Conversations 26-27-UAT

Not evaluated

[EVALUATE](#)



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EDGE LEARNING DEMO



Career Conversations Checklist Overview



Career Conversations 26-27-UAT

Not Evaluated

Assigned To
Wildcat Wildcat 

0%

▼ Overview

Assigned by: Career Conversation - Checklist 26-27 UAT - v2 -

▼ Evaluators

Sections and Items 

Expand All

REQUEST ALL

▼ Year-In Review:Goals & Accomplishments

▼ Overall Performance

▼ Set SMART Goals for a Successful Year Ahead

▼ Growth & Development



Year-In Review:Goals & Accomplishments

Checklist Items (2)

Expand All Items

☐ Employee Self Reflection on Goal Progress

☐ Supervisor Feedback on Goals Progress

Year-In Review:Goals & Accomplishments

Checklist Items (2)

Expand All Items

☐ Employee Self Reflection on Goal Progress

Employee completes a self-reflection on goals and performance. Reflect on the goals you set during last year's career conversation and describe progress you made towards achieving them. Please note any other accomplishments you would like to highlight as well.

Bear Down, Arizona!Bear Down, red and Blue!Bear Down, Arizona!

POST

CANCEL



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▲ ☒ Employee Self Reflection on Goal Progress

✓ Completed by: Wilma Wildcat I
Completed on: 13-JUL-2026



Career Conversation - Checklist 26-27 UAT - v2

In Progress

Due date: 30-OCT-2026 | *108 days remaining*

[VIEW DETAILS](#)



Human Resources

Poll Question

Is this coaching or corrective action?

Example 1:

Employee needs help improving presentation skills.

Example 2:

Employee has repeatedly missed deadlines despite prior feedback.



Training Update

Audience	Training Type
Supervisor	Career Conversations Supervisor Training: XX completed Supervisor Meeting: July 16 & August 20 Office Hours: September 10 (2 registered) & September 15 (0 registered)
Staff	Career Conversations Staff Training: XX completed Career Conversations Live Training: July 14 (149 registered) & August 12 (57 registered) Office Hours: August 26 (12 registered)
Open Office Hours	October 13, October 15, October 20, October 22



Audience Segmentation

Category	Assignment Status	Rationale
Staff	Automatically Assigned	
Faculty	Excluded	Completing Faculty 180 Annual Review
Postdoctoral Scholars	Excluded	
Graduate Assistants	Excluded	
Student Employees	Excluded	
Temporary/Seasonal Workers	Excluded	
UAGC	Excluded	Completing Workday Performance Management



Audience Exemptions

Situation	Potential Exemption Consideration
Extended Leave of Absence	Yes
Long-Term Medical Leave	Yes
Active Military Leave	Yes
Employee Separating Prior to Process Completion	Yes
Employee on Temporary Disability Leave	Potentially
Recently Hired Employee Not Participating This Cycle	Case-by-case



SBI4 Feedback Model

S

Situation. Understand the specific context where the behavior occurred

B

Behavior. Focuses on observable actions, not assumptions.

I

Impact. Explain how your actions affected the team, project, or outcome.

I

Intent. Reflect on how to adjust your behavior for a better outcome.

Positive: During our team meeting last Friday (*situation*), you presented clear, data-driven insights and responded well to questions (*behavior*). As a result, leadership felt confident in your recommendation and approved the proposal (*impact*).

Constructive: In yesterday's team meeting (*situation*), I noticed you interrupted others a few times while they were sharing ideas (*behavior*). This made it difficult for everyone to contribute fully (*impact*). How can you ensure everyone has finished sharing their ideas before adding your input (*intent*)?



Poll Question

What type of support request are you expecting most from leaders?

- a. Rating questions
- b. Difficult conversations
- c. Documentation concerns
- d. Process questions
- e. Employee pushback



Your involvement in Change Management & Communications

**Leader
Communications**
May 18

**EDGE Learning
eLearning**
June 15

- MarComm provides template by 5/20
 - HR Team outreach 6/5

- MarComm provides template by ~6/1
 - HR Team outreach ~6/10



Supervisor CC Readiness Check: Next Steps Guidance

Anyone on your team at risk of rating under meeting (evolving or developing?) If Yes, let's dive in further and if no proceed with your rating and conversation.

Proceed with your rating and conversation if one of these has taken place. **Consult with HR team to navigate if non checked.**

- ☐ Has any direct feedback been provided or conversation taken place?
- ☐ Documented coaching or performance conversations?
- ☐ Involved HR regarding the performance concerns?
- ☐ Employee received a letter of expectations or performance improvement plan?



Knowledge Check

Do you currently have any direct reports who may be at risk of not receiving at minimum a “Meeting” rating? **Option 1: Yes** **Option 2: No**

Option 2: No, Situational Leadership Alignment

Rating	Leadership Approach	Ways to Support the Employee:
Exceeding	Empower	• Provide autonomy • Encourage innovation • Support strategic growth and stretch assignments
Meeting	Delegate	• Delegate ownership • Encourage decision-making • Support continued development
Evolving	Participate	• Clarified expectations • More frequent feedback • Shared problem-solving
Developing	Direct/Coach	• Set measurable expectations • Monitor progress regularly • Clarify priorities and responsibilities



Insert photo here or graphic

SAMPLE SECTION HEADER

SAMPLE SUBHEADER

- Sample bullet point
- Sample bullet point
- Sample bullet point



Human Resources

Insert photo here or graphic

Situational Leadership

SAMPLE SUBHEADER

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- Sample bullet point



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SAMPLE SECTION HEADER

EXAMPLE W/BRAND-APPROPRIATE IMAGE

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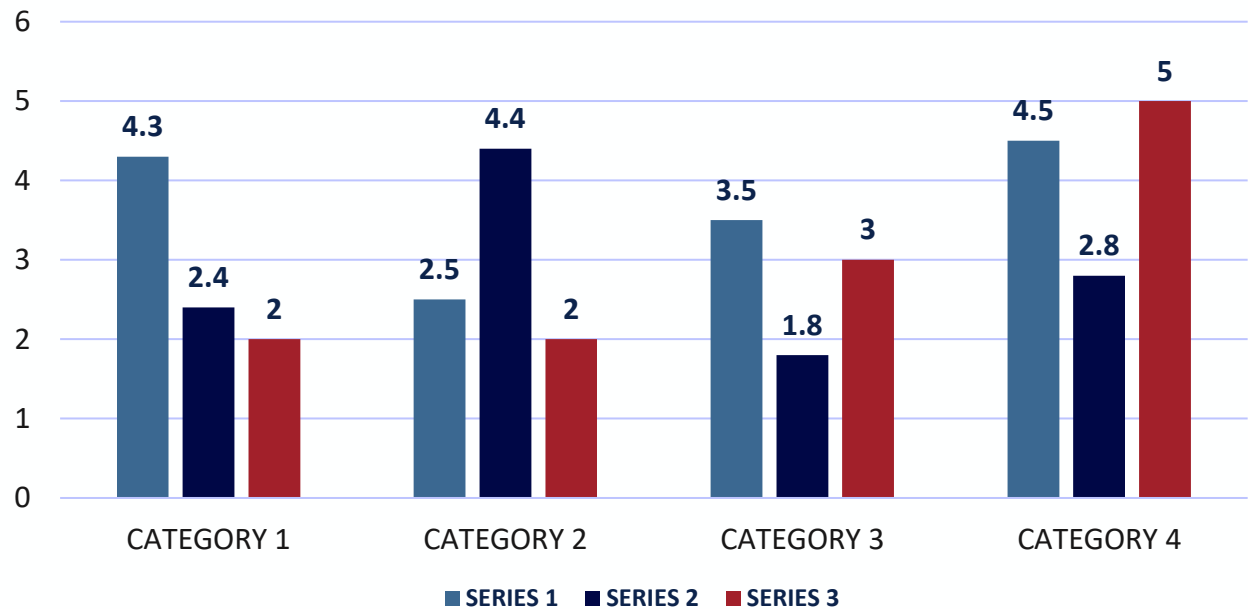
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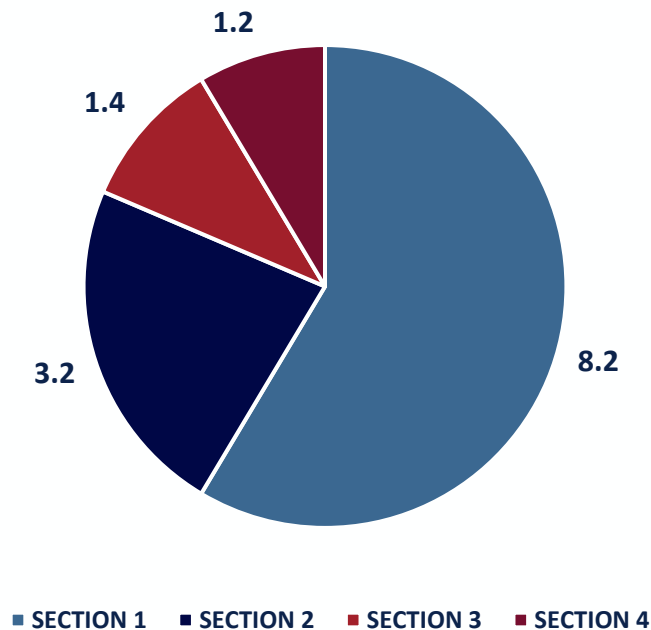
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Source: XXX



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