Performance Management Training

Office of Human Resources
Organizational Relations, Learning & Development
Expectations

- Work Hours/Breaks and Lunches
- Stewardship of University/State Property
- Dress Code/Personal Attire
- Principles of Ethical Behavior
- Professional and Respectful Behavior
- Overall – Goals & Objectives
Definition:

- A collaborative process between a manager and an employee that is created and implemented so that the employee’s performance is identified, selected, developed, and rewarded.
Performance Management Training

Why Performance Management?

- To enhance organizational effectiveness
- To align individual contributions to the University system-wide vision, the vision and strategic goals relating to each campus, and the mission of the work unit
- This ensures that work unit, campus, and/or University goals and objectives are being met
Successful Performance Management Characteristics

- Employee and supervisor collaborate and communicate during all phases (planning, coaching and evaluation)
- Managers, supervisors, and employees evaluate and define *what* and *how*
- Training is linked to performance expectations
- Focus is on continuous improvement
Performance Management Cycle
Performance Management Cycle

**PAYOUT**
- Allocation of funds
- Award distribution
- Perf. mgmt. review

**PLANNING**
- Review objectives
- Reach agreement
- Develop Plan

**EVALUATION**
- End of cycle review
- On-going development
- Perf. mgmt. review

**CONTINUOUS**
- Tracking
- Feedback

**COACHING**
- Review progress
- Discuss roadblocks
- Adjust If Necessary
Planning
Job Description:

• The official description of the duties assigned to the position.

• Performance planning and evaluation must be related to the set of duties.

• For that to happen, the job description must be current and accurate.
Link Planning To The Mission

- Every employee should understand how job duties support the mission and objectives of the work unit and the campus.

- The campus has a mission, each work unit should also have a mission.

- Performance planning includes being clear about these linkages.
The S.M.A.R.T. Model

- **Specific**
  Precisely define the work involved

- **Measurable**
  Able to assess achievement

- **Agreed**
  Both supervisor & employee are committed

- **Realistic**
  An acceptable but stretching challenge

- **Timed**
  Specified completion and review dates
- **Routine objectives:**
  - Regular duties and responsibilities that are part of the job.

- **Problem-solving objectives:**
  - Related to specific problems.

- **Objectives supporting innovation:**
  - Pertain to new ideas, services, or ways of doing things.
• **Personal development objectives:**
  - Related to an individual’s professional development and growth.

• **Organizational development objectives:**
  - Objectives for an entire organization or a specific department.

**Tip**

No more than five objectives or goals should be used.
Critical Issues To Discuss:

★ What is “Meeting Expectations”?  
★ What is “Exceeding Expectations”?  
★ What is “Outstanding”?
Measurement Methods

⭐ Cost or Cost Savings
⭐ Quantity
⭐ Quality
⭐ Timeliness
⭐ Customer Satisfaction
Contributors to Success

- Knowledge
- Skills
- Abilities
- Behaviors
- Characteristics

...required for successful performance
Performance Management Forms

- Substantive Form
- Single-Page Public Record Form
Coaching
Performance Management Training

Coaching

- Be prepared
- Review progress
- Provide Feedback
- Discuss roadblocks
- Make revisions to plan is necessary
Evaluation
Best Practices

★ Process that includes supervisor and employee participation

★ Formal evaluation session with discussion of the rating

★ Completion of evaluation form including narrative comments
The supervisor and the employee gather information from:

★ Work product  
★ Notes  
★ Employee work records  
★ Chronological records  
★ Coaching and Progress Review records
Supervisory Responsibility
Performance Management Training

Supervisor Responsibilities

★ Communicate expectations and performance standards

★ Measure and evaluate performance.
Here’s where we are…

How are we going to get where we need to be?
What If That Is Not Effective?

Classified Staff
Messages of Expectation: process per state rules

- Letter of Instruction
- Corrective Action
- Disciplinary Action
What If That Is Not Effective?

Exempt Staff/Faculty

At Will: What does that mean?
What If That Is Not Effective?

Exempt Staff/Faculty
Messages of Expectation

★ Letter of Direction
What If That Is Not Effective?

Messages of Expectation

Areas Needing Improvement

*Lab Preparation*

★ On (DATE), you...
★ As a result...

*Interpersonal Skills*

★ On (DATE), you...
★ As a result...
What If That Is Not Effective?

Messages of Expectation

Directives You Must Follow
On an immediate and sustained basis, you must:

* **Lab Preparation**
  ★ Set up equipment by…

* **Interpersonal Skills**
  ★ Treat everyone in a professional and respectful manner…
What If That Is Not Effective?

Considering Disciplinary Action

Classified Staff

★6-10 Meeting
What If That Is Not Effective?

Exempt Staff/Faculty

★Termination Handout
Questions?
Thank You!