



# Performance Management Process

# Today's Objectives

- Overview of the Performance Management Process
- Discussion of the Performance Evaluation Template and other Resources
- Review of HR webpage
- Q&A

# Performance Management

- Begins with the recruitment and on-boarding process.
- Performance management eliminates the performance review as the **focus** and concentrates instead on the entire spectrum of performance management and improvement strategies.
- The majority of your performance evaluation conversation should **FOCUS ON THE FUTURE.**

# Performance Planning

- *Performance planning is a shared responsibility by both the employee and supervisor.*

# Resistance

- Managers cite performance reviews as one of their most disliked tasks.
- Employees express concern that the evaluation process is not objective.
- How can the process be easier and more objective?

# Focus on the Future

- Employee performance improvement

Ways to improve and develop in their role:

- Training and Development
- Cross-training
- Challenging assignments
- Request regular performance feedback

# Alignment with..

- Department and School vision and goals
- Departmental strategy and action plan
- Expectations
- Individual capabilities (skills, knowledge and abilities)

Fully utilizing employee's strengths will have a significant impact on results.



# Clear Communication Leads to...

- Employee engagement and fulfillment of expectations.
- Opportunities for tapping into employees' interests and passions.
- Discovering development and training opportunities for higher effectiveness and retention.

# Overall Objective

- The Performance Management Process should be ongoing throughout the year. Expectations should be communicated clearly on a regular basis.
- There should be **NO SURPRISES!**

# Performance Evaluation Planning

- As the value in organizations increasingly shifts from tangible to intangible resources, it becomes even more important to focus on how we manage and communicate with our people.
- Measuring performance at an individual level is important because these intangible assets – the knowledge, skills and abilities of an organization's workforce – are increasingly driving organizational value.

# Document Review

- The evaluation process will be much easier and impactful if you review and discuss with your employee the job description, performance and development summary and objectives/standards established for last year prior to completing the evaluation.

# Completing the Evaluation

- Base the evaluation on observed performance during the rating period, not on what is expected in the future.
- Evaluate employees against both results and the way they achieve them.
- Evaluate overall performance throughout the entire rating period; not only on significant successes and failures or recent performance.

# Evaluation (continued)

- Avoid overrating a poor performer as a motivation tool because that rating will stand as a record of what the organization is willing to accept from the employee in the future.
- Consider various aspects of the employee's performance that you want to discuss with the employee. The evaluation process should serve as a stimulus for better communication between you and the employee.
- Take your time!

# Meeting with Employees

- Allow adequate time for the meeting
- Chose a quiet, private location with as few interruptions as possible.
- Create a positive environment and help the employee feel as ease.
- Give balanced feedback, both positive and negative, but start with the positive.
- Focus on the job, not the person.
- Ask questions and allow the employee to provide feedback.
- When discussing areas for improvement, discuss methods and objectives for improving.

# Conclusion of Evaluation

- Summarize and review the important points of the discussion.
- Restate the action steps that have been recommended and provide a time frame for completion.
- Make sure employee reviews the evaluation and has the opportunity to provide comments.
- Answer questions and clarify any confusion the employee may have with regard to performance expectations.
- Have employee sign evaluation to acknowledge that he or she has read it (does not signify agreement with content).

# Follow-up

- Follow-up with the employee at least every three months to see how plans are proceeding with the given time frames.
- Offer the employee assistance in achieving performance objectives/standards and encourage discussion of successes and obstacles.

# Feedback

- When providing feedback, it's important that it be given in a timely and balanced manner by explaining what an employee did well and what he/she might have done better.
- Record of Employee Performance

# Poor Performance

- Evaluation forms should not be used to initially address a performance problem or initiate a disciplinary action. When a performance problem arises it should be addressed immediately; not put off until evaluation time.



# Identify Training Needs

- Outline during each evaluation period the areas in which you feel your employee would benefit from training and development.

# Rating Scale

- The purpose of assigning a number to a performance level is to communicate to the employee how he/she is doing relative to expectations. When rating an employee on a scale of 1-4, it is important to keep in mind that with the assignment of a 1 or a 2, some type of performance plan should be in place. A rating of 3 indicates that the employee is performing at the expected level of performance. It's important to convey to the employee that a rating of 3 is a desirable rating to achieve.

# Rating Scale (continued)

- A person who receives a rating of 4 should exceed expectations on an ongoing basis. The supervisor will need to provide specific examples of how the employee consistently exceeds performance expectations and position requirements and contributes at a very high level over the duration of the rating period.

# Q&A

- Any questions?