Talent Management Cycle

Goals of the University's Performance Management Program

- Facilitate effective communication between employees and managers/supervisors;

- Ensure employees have a clear understanding of the performance and behaviors expected of them;

- Ensure employees have a clear understanding of how their individual work contributes to achieving the mission of their work unit and the University;

- Ensure employees provide, as well as receive, input into the development of performance goals and ongoing information about how effectively they are performing relative to established goals; and

- Identify and implement opportunities for employee development and discussion of career objectives.

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Process of Managing Performance

1. Communicating employee performance expectations
2. Maintaining ongoing performance dialogue
3. Conducting annual performance reviews

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Communicating Performance Expectations

- Supervisor meets with employees at beginning of performance cycle to establish expectations, specify how performance will be measured.
- SHRA evaluations are based on institutional goals and individual goals. CSS evaluations are based on CSS Core Work Values and Job Duties as outlined by the employee's job description.
- Expectations are discussed with new hires/transferring employees within 30 days, which includes approving their job description. Individual goals for new SHRA must be set within the first 60 days in PeopleAdmin.
- Employees are expected to meet supervisor/manager expectations.

Individual Goals

- Working with employee, supervisor defines 3-5 individual goals for each employee each cycle.

- Not intended to cover all aspects of employee work product (institutional goals do that).

- Focus is on key results/outcomes/deliverables, not steps in the process.

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Smart-er Goals

- S - Specific
- M - Measurable
- A - Achievable
- R - Relevant
- T - Time-bound
- E - Expectations
- R - Resources

Individual Goals

- **Do this**…. Present the new Performance Management plan to all SHRA supervisors

- **in order to**…. provide sufficient guidance to supervisors on new program

- **so that**…. they will be ready to develop performance plans in 2017.

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Structure of Goals

- Three things to keep in mind while preparing SMART-ER goals:

    - 1. The Goal Itself

    - 2. The Specific Deliverables

    - 3. What "Exceeding Expectations" Looks Like.

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Structure of Individual Goals

- **Goal**: Present the new PM plan to all SHRA supervisors before December 15, 2016 in order to provide sufficient guidance to supervisors on new program so that they will be ready to develop performance plans in 2017.

- **Specific Deliverables**: 1. Develop a PowerPoint presentation to be used by all involved. 2. Determine what handout materials are needed.

- **Exceeding Expectations**: Not only present new PM plan to all supervisors face-to-face but develop online Cornerstone training based off of face-to-face presentation material as well.

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Institutional Goals

EXPERTISE
Precision
Resourcing
Innovation
Development

CUSTOMER-ORIENTED
Clarity
Awareness
Attentiveness
Diplomacy

COMPLIANCE/ETHICS
Policy
Safety
Ethics
Respect

ACCOUNTABILITY
Productivity
Autonomy
Prioritization
Coordination

TEAM-ORIENTED
Collegiality
Collaboration
Contribution
Attendance

SUPERVISION
Oversight
Goal-Setting
Managing Talent
Leading

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Talent Development

- Recommended (not required) that each employee have at least ONE Talent Development Goal per cycle.

- Supervisor and employee work to determine appropriate goals

- Supervisor expected to address deficiencies of any employee who received any rating of "Not Meeting Expectations."

- Some examples could include securing funding for a certification program, attending seminars provided by the University, etc.

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Ongoing Performance Dialogue

- Progress toward meeting expectations shall be measured, reported, discussed, and documented <u>throughout</u> the work cycle.
- Provide continuous timely feedback, both positive <u>and</u> negative.
- Supervisors are expected to use appropriate supervisory techniques to support employee efforts to meet or exceed their performance expectations.
- When expectations change during the course of the work cycle, supervisors shall communicate these changes.

Off Cycle Evaluations

Evaluation Type	Description
Probationary	Due Quarterly (January, April, July, October)
Interim	Required if employee has Disciplinary Action, is Not Meeting Expectations, if supervisor wants to, or if Chancellor/designee requires
Transfer	Due at time of Transfer or if supervisor leaves
Employee Requested Evaluations	Employees can request one off-cycle evaluation per performance cycle granted 60 days has passed since last evaluation
Management Driven	Supervisors can conduct as often as they find necessary.

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Feedback & Coaching

- Should be timely. Address concerns as they occur.
- Helps to meet goals as well as assist in the development of employee skills by providing:
  - Instructions
  - Guidance
  - Support
  - Advice
- Corrective/Conduct/Coaching sessions held in a private setting. Give the employee prior notice of the time and place when appropriate.

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Feedback Sandwich

- Introducing feedback surrounded by praise.
- Next, deliver the opportunity for growth in a positive tone.
- Finally, close the feedback session on a positive note.

Addressing Poor Performance

- Supervisor shall document the performance that falls short of expectations. The documentation will specify: (if you didn't document, it didn't happen!)
    - the performance problem
    - the steps to be taken to improve performance, including the timeframe for improvement
    - the consequences of failure to improve
    - a follow-up date.
- Discussions should be had in person with the employee and it is recommended that they are followed up by email.
- Utilize HR Employee Relations as needed to address concerns of performance and/or conduct.
- Performance deficiencies that occur during the performance cycle <u>shall be</u> referenced in the annual performance evaluation. Keep in mind SHRA written warnings can be voided by Meets Expectations annual evaluations.

Documentation

- Investigate and gather information
- List facts surrounding the performance or behavior incident
  - Who was involved
  - What was the action and outcome that took place
  - When did the incident occur
  - Where did the incident take place
  - Why did the incident take place

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Performance Evaluations

At the end of the performance cycle, supervisors shall evaluate employees' performance during the past year compared to their performance expectations. They shall use verifiable information collected and documented throughout the cycle to justify the rating.

- Narratives should be written to display behaviors and outcomes that support the selected rating. Narratives shouldn't contain protected or discriminatory information (FMLA, ADA, Community Service Leave, Military Leave, etc.)

- Prior to discussing a completed performance evaluation with an employee, a supervisor shall send the evaluation to the next-level manager to ensure that ratings are appropriate and consistent.

- Supervisors shall discuss the evaluation with their employees. Supervisors should confirm discussion of appraisal and employee should acknowledge evaluation in PeopleAdmin.

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Performance Evaluations

- Biases
  - Recency
  - Halo
  - Horn
  - Similar to me
  - Leniency/Strictness
  - Personal bias/favoritism
- Lack of differentiation

Supporting Employee Development

- Many employees may express interest in growing in their current positions or in furthering their careers

- Supervisors shall work with them to identify strengths and weaknesses and, if appropriate, to help them prepare an individual development plan.

- Individual development plans may specify how employees can more fully apply their strengths in their current positions, build up areas of weakness, enhance their performance in their current positions, or develop the skills and experience they will need for possible future assignments.

Motivating Employees

- Know what your employees want to receive from their jobs
- Give your employees positive, constructive feedback
- Show sincere appreciation when warranted
- Have an Open Door Policy
- Conduct Regular Staff Meetings

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Disciplinary Process

- A useful tool for correcting and improving performance problems (such as):
  - Unsatisfactory Job Performance
  - Grossly Inefficient Job Performance
  - Unacceptable Personal Conduct

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Questions