Performance Management

Current Rating Period:
March 1, 2019 – February 29, 2020
Learning Objectives

• Explain the Performance Management cycle
• Construct and deliver effective feedback
• Write SMART goals for development planning
• Complete and return a performance review
Definition

Performance management is an ongoing cycle of goal-setting, feedback, and review, which allows employees and their supervisor to track and monitor progress towards goals.
Performance Management

• Provides a “roadmap” to determine priorities and meet goals
• Guides training and development
• Improves overall engagement by providing purpose
• Ensures work supports mission and goals of the university.
• Allows opportunity to correct performance issues
• Creates record of both accomplishments and performance problems
Performance Cycle

Beginning of Cycle
(Review and Planning)
Set Development Goals and Expectations

During the Cycle
(Feedback)
Check-in 3 months to evaluate progress

During the Cycle
(Feedback)
Check-in 6 months to evaluate progress

During the Cycle
(Feedback)
Check-in 9 months to evaluate progress

End of Cycle
(Prepare for Review)
Gather supporting documentation
Beginning of Performance Cycle

• Supervisor and employee review performance from the previous year.
• Together, create developmental goals for the upcoming year.
During the Performance Cycle

• Provide regular feedback
• Review and adjust goals
• Identify accomplishments
• Recognize and reward
• Determine gaps in performance
• Intervene with performance issues before they become a pattern
  • Consult with HR partner for strategies to address specific issues.
End of Performance Cycle – Prepare for Review

Gather supporting documentation to review staff
• This may include:
  • their position description
  • new hire probationary reports
  • past performance evaluations
  • self-assessments
  • other performance documentation.
• Ask staff member to share their accomplishments
Who is Reviewed?

• Exempt employees who started on or before February 28, 2019
• Non-Exempt employees who started on or before August 31\textsuperscript{st}, 2019
• Both regular and contingent II employees (exempt and non-exempt)
• Any employees who report to you
  - May involve previous supervisor if recent change

All staff members (except Police Officers) are reviewed using the same form.
2020 Timeline

• Review period
  • March 1, 2019 – February 29, 2020

• Performance Review Completion
  • March 9 – May 1, 2020

• Submit Performance reviews to PerformanceReviews@towson.edu no later than May 1, 2020
Step Two: Complete the following sections using the supporting documentation above.

Section I: Narrative of job performance: Using examples and key performance metrics, evaluate the overall performance of the employee during the review period. The narrative should be a thorough assessment, including any specific areas of performance to note.

Click here to enter text.

Section II: Areas of development: Provide specific examples to support.

Click here to enter text.

Section III: Areas of strength: Provide specific examples to support.

Click here to enter text.
Section IV: Supervisory performance

• If your employee supervises other staff members, complete section IV.
  • If your employee does NOT supervise other staff, leave this section blank.

Section IV: Supervisory performance: If applicable, provide specific examples of performance when supervising staff employees.

Click here to enter text.
Crafting STAR Feedback

• Situation/Task – be specific about what happened and when.
• Action – what did the employee do?
• Result – What was the outcome of this action?

• Alternative result – Provide example of a different action that the employee could have taken, and the expected outcome from this change.
Be Clear and Specific

Too general: You did a great job this year.

Better: You were tasked with recruiting 7 new staff members for our health center. You reviewed and considered over 100 applicants, and selected the best qualified for further consideration by hiring managers. This resulted in filling all 7 positions by the December 31st deadline.
Not useful:
The reports you provided did not meet my expectations.

Useful and actionable:
The reports you provided had many grammatical and punctuation errors. This made it difficult for the recipients to understand the results. In the future, prepare the reports further in advance, ensure they are proofread by another person on our team, and approved by me before distributing outside of our team.
**Be Sincere**

**Insincere:** You’re the best. Your work is always top notch. No one could ever replace you. This department would be lost without you.

**Better:** The reports you provided were of very high quality. I appreciate the attention to detail, organization, and coordination with others on campus. Your hard work was noticed and was extremely valuable in the department’s planning process.
Why Set Goals?
Purpose of Goal Setting

• Sets expectations for employees
• Encourages accountability
• Provides a link between work activities and department priorities
• Encourages development
• Improves achievement of measurable outcomes
• Motivates employees to make continuous progress
Upcoming goals: Identify a minimum of three developmental goals for the upcoming review period. This may include specific goals related to performance as well as professional development opportunities.

Goal 1.
Goal 2.
Goal 3.
SMART Goals

• Specific – explicitly shows the who, what, why, when, and where details
• Measureable – includes an amount, number, extent, size, or frequency
• Attainable – complex enough to be challenging, but also realistic enough to be within reach
• Relevant – related or linked to the essential tasks or functions of the position
• Timely (Time Bound) – tied to a deadline or targeted time of completion
Examples of SMART Goals

By December 31, 2020, develop a training program for new supervisors, to be conducted bi-monthly. Through follow up and tracking, ensure 100% of newly hired supervisors attend.

Streamline the performance review process by combining exempt and non-exempt forms into a single form and allowing for narrative feedback for all staff members. Ensure forms are complete and available to reviewers by March 9, 2020.
Development Goals

• Tie to anticipated needs in the employee’s current position
• Consider the university’s future needs
• Focus on the employee’s strengths, talents, and interests
• Plan for employee’s career path
• Identify training needs and plans
70% - Job related experiences

- Participate in cross training or job rotation
- Volunteer for a task force or committee
- Participate in a temporary assignment
- Mentor someone else
- Serve on a committee with a professional organization
- Volunteer for a community service group
20% Mentoring, Coaching, and Feedback

- Targeting specific task/goals or future career direction
- One on One check-in meetings
- Feedback from peers, managers, customers
- Being mentored (formally or informally)
- Performance review/probation report
10% Training

- E-learning courses
- Online webinars
- Instructor led training programs
- Conferences and seminars
- Books and articles
- Professional organization memberships
Examples: Development Goal

• Attend the 2020 Association for Talent Development annual conference, and bring back at least 3 new ideas to consider implementing at TU.

• Lead project to improve department participation in recycling at work, to achieve 50% reduction in trash within a 6 month period of time.

• Attend monthly meetings throughout 2020 to learn about the budget and make one cost-saving recommendation.
Performance Review Form – Overall Performance Rating

• Give one overall performance rating – supported by narrative feedback sections I-IV.
• Should not be the first time staff member is alerted that there is a problem.
• If providing “Does Not Meet Expectations” rating, first contact your HR partner.

OVERALL PERFORMANCE RATING: Please indicate by marking an X in the appropriate box

<table>
<thead>
<tr>
<th>Meets Expectations</th>
<th>Does Not Meet Expectations</th>
</tr>
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<tbody>
<tr>
<td>□</td>
<td>□</td>
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Consistently demonstrates proficiency in the execution of the majority of critical job responsibilities and objectives throughout the rating period.

Overall performance needs improvement; job responsibilities and objectives have not been consistently met throughout the rating period.
Employee Feedback/Comments

• Optional
• Give staff member opportunity to add their feedback or comments.

Employee Feedback/Comments (optional):

Click here to enter text.
When There is a Disagreement

• Refer to next level of supervision
• Consult with Human Resources
For all Reviews:

• Discuss review with next-level supervisor
  - BEFORE reviewing with employee
  - Revise document if needed

• By end of March, put performance review meeting on your calendar.
For Further Assistance

HR Partners

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