

Performance Management @B-W Informational Session

2008

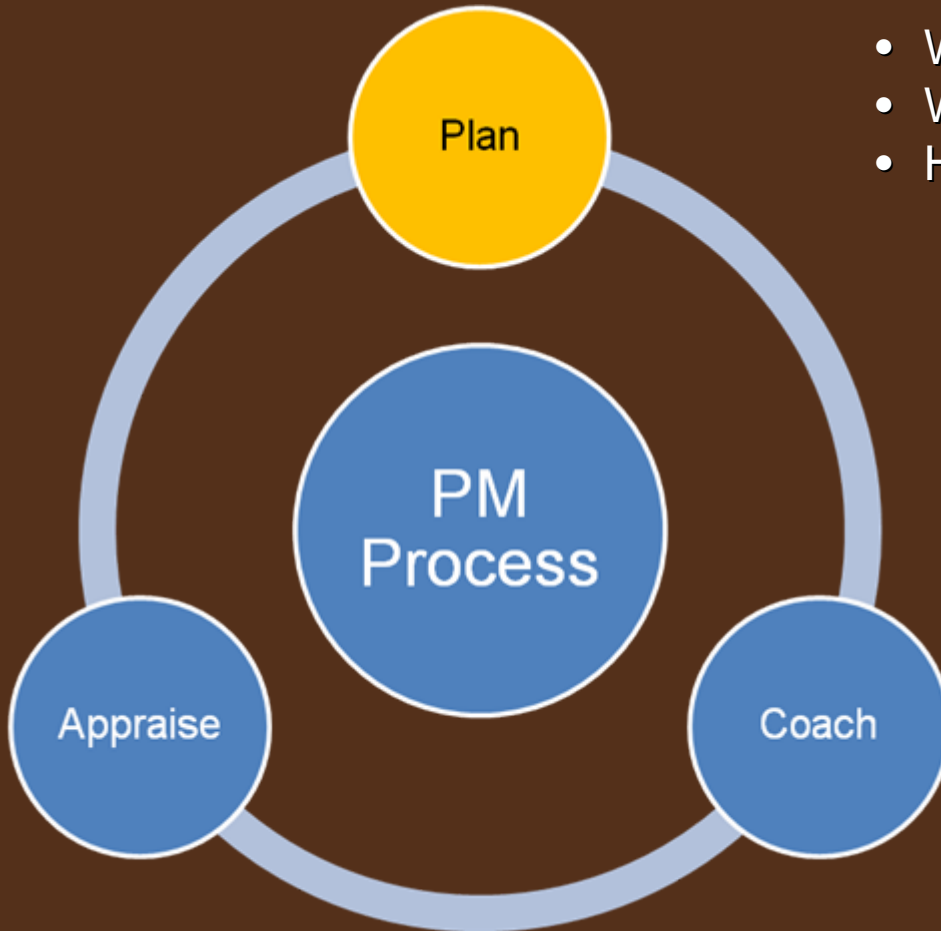
Workshop Objectives

- Understand the elements the B-W performance management program
- Explain the components of the B-W Annual Evaluation (AE) Form

Agenda

- What is Performance Management @ B-W
 - Plan: Using the S.M.A.R.T. guidelines for writing goals
 - Coach: Tips for giving and receiving feedback
 - Appraise: Self-assessment and evaluation meeting
- Next Steps
- Resources

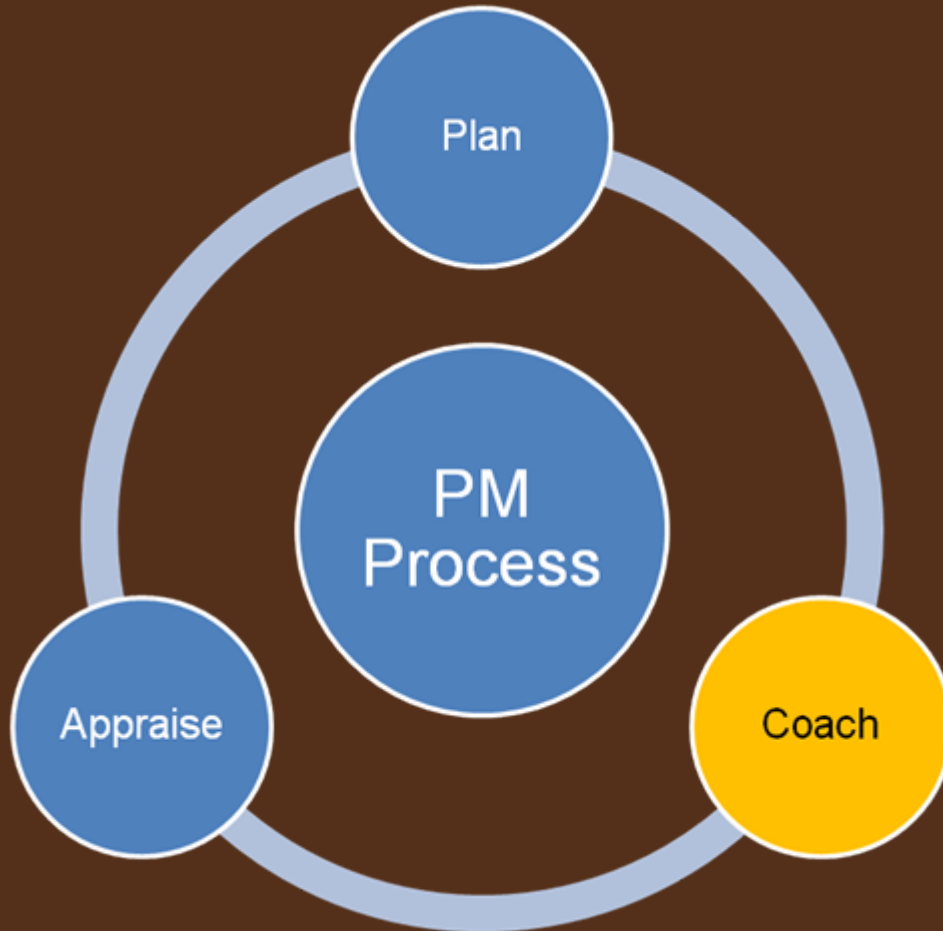
Performance Management@ B-W



- What needs to be done?
- What purpose does it have?
- How should it be done?

- **Review job description**
- **Develop goals for upcoming year**
- **Establish performance success factors**

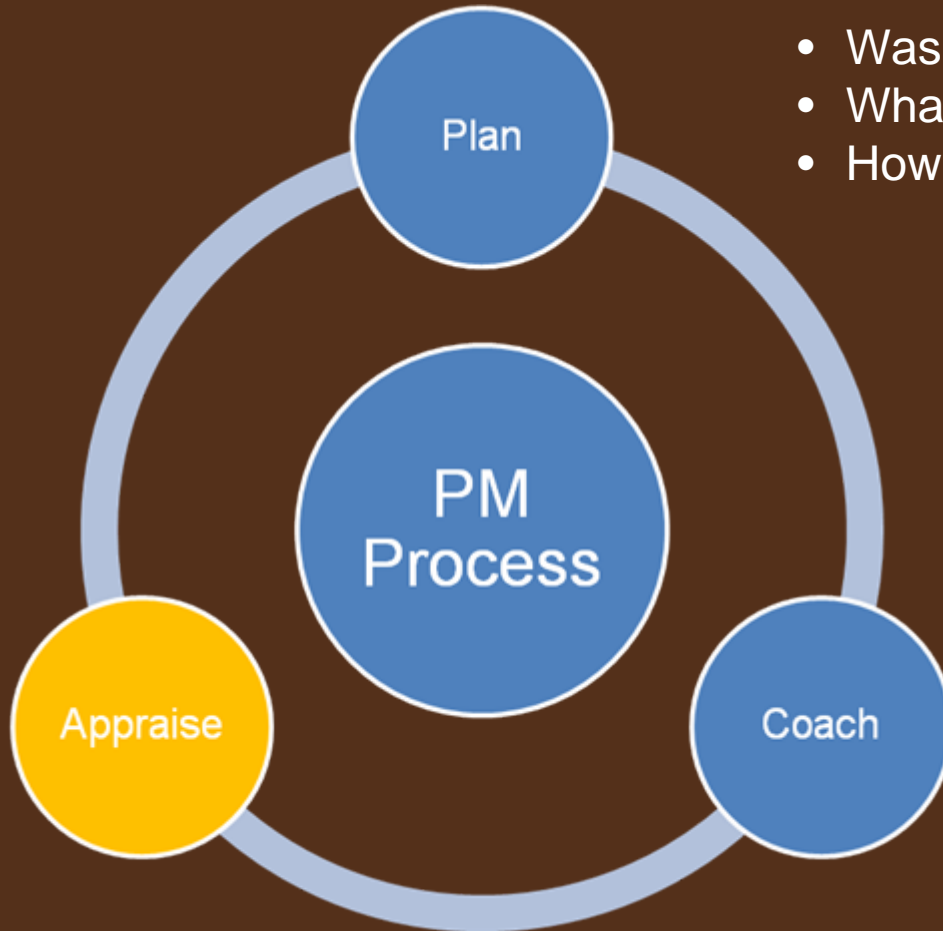
Performance Management @ B-W



- How well am I doing?
 - What barriers are in my way?
 - Has anything changed?
-
- **Ongoing positive and constructive feedback**
 - **Hold midyear coaching meeting**

Performance Management

@ B-W

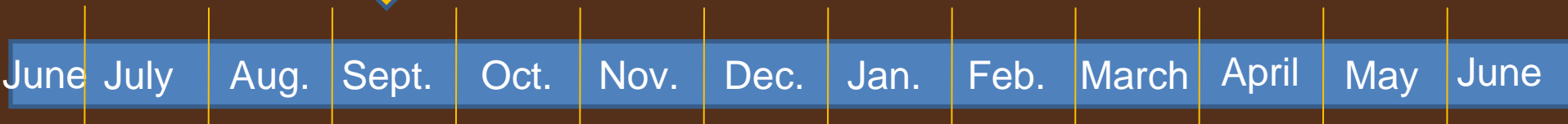


- Was it done to expectations?
- What can be done different in the future?
- How can I develop to support the future?

- **Employee Complete self-assessment**
- **Manager Complete evaluation form**
- **Hold performance review meeting**
- **Establish development and performance goals for the future**

Performance Management @ B-W

Timing



Goals for upcoming year (June)

Midyear coaching

Appraisal for previous year's performance (May)

Midyear coaching

Appraisal for previous year's performance (June)

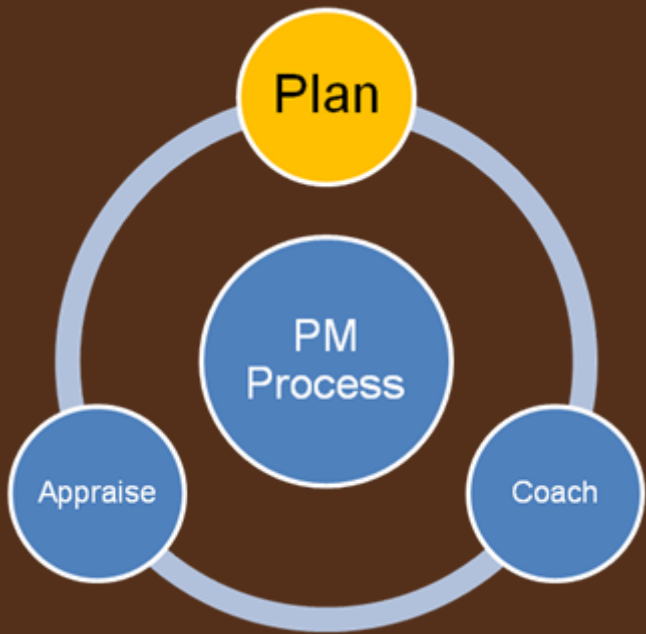
Goals for upcoming year (July)



Academic year cycle (June 1 – May 31)



College fiscal year cycle (July 1 – June 30)



Planning

Developing a common understanding to guide performance



Planning

- Establish Goals for the upcoming year
- Discuss/enhance performance standards and expectations

Planning: Tips on Setting Goals

- Look at position, performance, and department
- Follow the S.M.A.R.T. guidelines
- Limit to 4-6 goals. At least one should have a professional development focus
- Management and employee involvement
- Adjust throughout the year if necessary



Planning: Setting Goals that Work



Planning: Office Manager Background

There are 4 additional secretarial services, 1 part-time student and no open faculty positions for the academic year. Last year, there were some complaints from faculty that they did not have supplies when needed. They ended up ordering on their own and resulted in an overage of supply expenses by 10% from the past year.



Based on the 4 responsibilities where would you focus the goals?

Planning: S.M.A.R.T. Guidelines

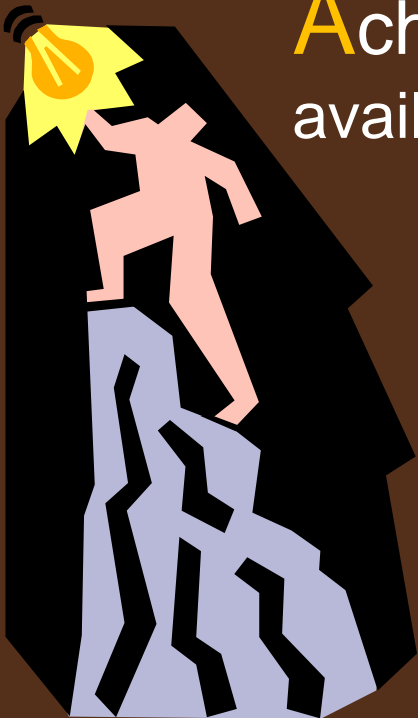
Specific “what” must be accomplished

Measurable determines if what was done successfully

Achievable Are all the skills and resources available to get it done?

Relevant Does it reflect the priorities of the job, department, and or College?

Time-framed is there a time frame to help define when or how the goal will be met?





Planning: Goal Example

Respond to all emails quickly

Specific: *Respond to email inquiries from potential applicants quickly*

Measurable: *Respond to email inquiries from potential applicants within 24 hours*

Achievable: able to respond within 24 hours?

Relevant: Is it important to the job, department, College?

Time-framed: *within 24 hours*

Planning: Office Manager Goal

Oversees purchasing of department supplies, equipment, books, service contracts, staying within the department budget

Order and organize office supplies so materials are available the day needed and total expense doesn't exceed budget.



Planning: Performance Success Factors

Behaviors that are fundamental to the way we do work at B-W. The “how” of getting the job done

All employees

- Efficiency and time management
- Communication and Teamwork
- Effectiveness
- Customer Service Orientation
- Adaptability

Department specific

Management and Leadership

Planning: Discussing the Success Factors

Order and organize office supplies so materials are available the day needed and total expense doesn't exceed budget.

Effectiveness Includes the quantity and quality of works as well as organizational skills necessary to perform successfully.

Outstanding	Excellent	Successful	Needs Improvement	Unsatisfactory
Others rely on him/her to help stay organized	Others can find things he/she organizes	Can find needed information	System not easy for others to use	Wastes time because of missing items

Planning: 3 Tips for Using Performance Success Factors

- Review at the beginning of the performance cycle.
- Explain the different levels of success where applicable
- Start small with department specific factors

Planning: Using the Annual Evaluation (AE) Form

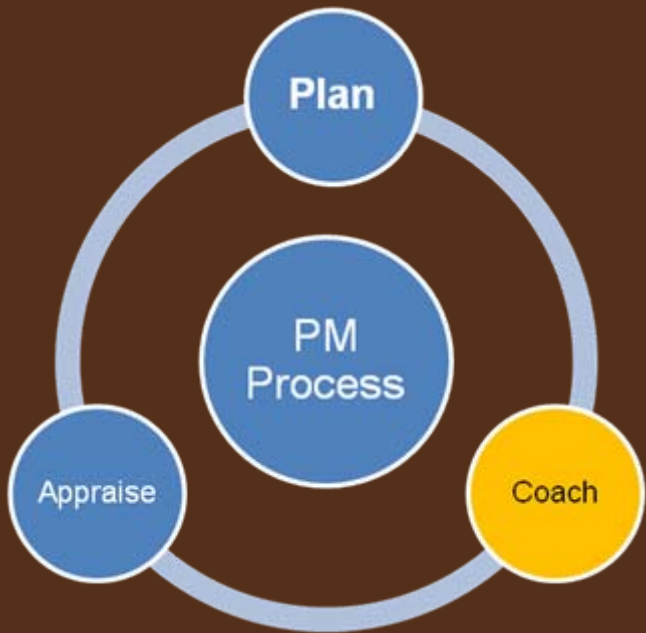
1. Manager confirms goals for upcoming year and record on Annual Evaluation (AE) form
2. Manager adds department –specific success factors (if applicable)
3. Manager and employee review goals and success factors

B·W

BALDWIN
WALLACE
COLLEGE

Coaching

*Communicating
throughout the year*



Coaching

Why?

- *Opportunity to communicate between manager and employee*

What?

- **Ongoing positive and constructive feedback and monitoring**
- **Manager** initiates midyear coaching meeting
- **Employee** prepares thoughts and notes on progress towards goals, potential barriers, etc.
- **Manager and employee** meet to discuss performance and any changes

When?

- Ongoing and immediate
- Informal meeting six months into performance cycle

Giving Positive Feedback: TRIC model

- **T**ell about the specific situation
- **R**ecognize how the behavior impacted you, your team, your clients
- **I**dentify what you would like to change or have understood
- **C**heck for understanding , be open to alternative views

Yesterday when you presented your materials, I noticed you were able to move out of your presentation and address questions without missing a beat

As a result, the rest of the committee got their questions answered and you were able to create buy-in from the group

You exhibited very good listening skills with the group, this is a skill you should continue to use.

How did you think the presentation went?

Giving Constructive Feedback: TRIC model

- **T**ell about the specific situation
- **R**ecognize how the behavior impacted you, your team, your clients
- **I**dentify what you would like to change or have understood
- **C**heck for understanding , be open to alternative views

Last night you forgot to put away all the supplies.

The morning shift spent an extra 15 minutes looking for materials, which made them behind for the morning.

Before you leave it is important to the whole team to clean up for the next shift.

What can we do to help you get this done in the future?

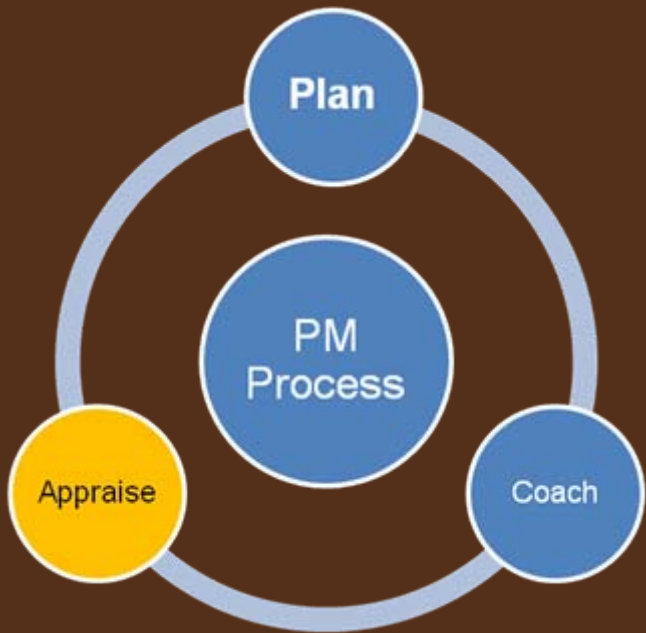


Tips for Giving Feedback

- No time like the present
- Cool off if angry
- Assume positive intent on employee's behalf
- Positive in public; constructive in private
- Do it in person
- Document it for the future

Coaching @ B-W

- Manager schedule midyear coaching meeting (Dec. – Jan.)
- Meet to discuss progress
- Adjust goals if necessary



Appraise

*Reviewing performance
now and for the future*

No surprises

Appraise: The Overall Performance Rating

The overall performance rating is based on:

- Goals and Objectives – *what*
- Performance Success Factors - *how*

No Surprises



Overall Performance Rating

No Surprises

- Outstanding Performance
- Excellent Performance
- Successful Performance
- Needs Improvement
- Unsatisfactory

Definitions are on page 10 of AE Form

The Appraisal Process: Preparing

Chris (Office Manager)

Complete self-assessment



Pat (Director)

Completes the rest of the AE Form



Send to Next Level Mgr & VP for approval

Upon approval schedule review meeting



Pat (Director)

Pat (Director)

The Appraisal Process: Completing

Chris and Pat

Conduct
Review
meeting

- Discuss goals for next year
- Employee adds comments and signs

Pat

Send to next
level for
signature

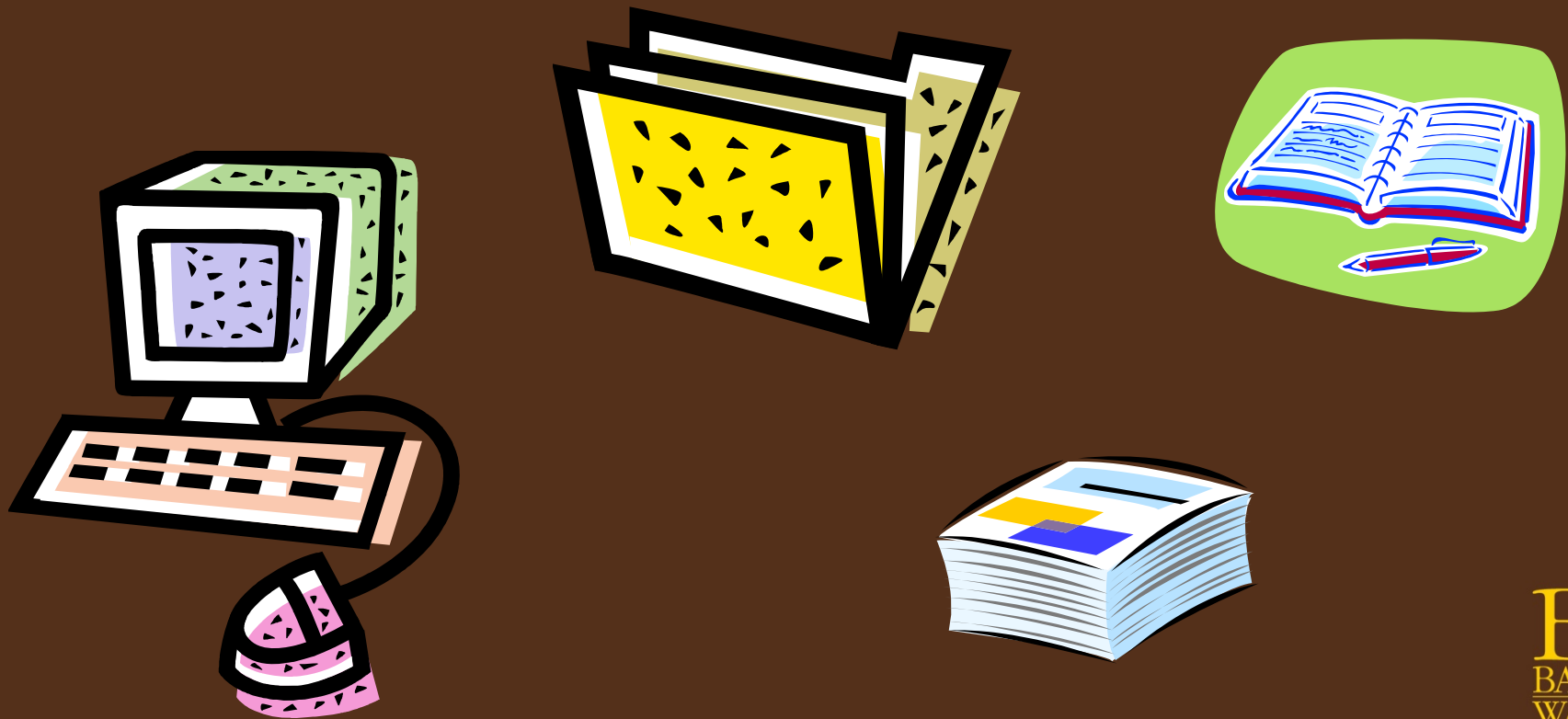
Pat

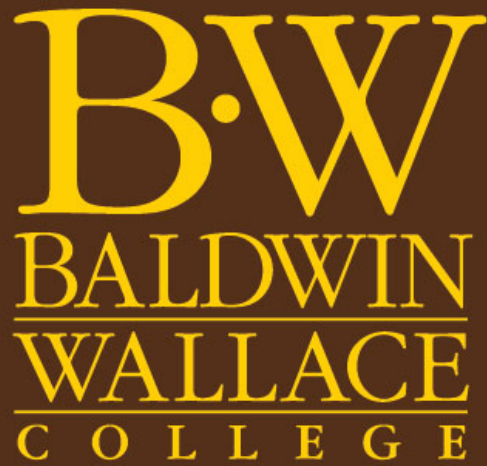
Makes
copies &
sends to HR

HR adds to file

Final Tip: Keeping track of accomplishments

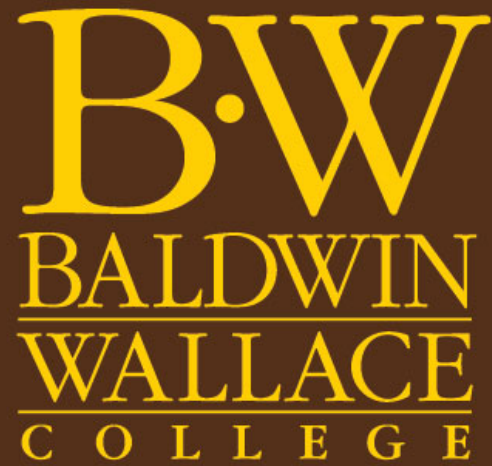
- Create your own “Feedback Library”





Additional Resources

www.bw.edu/resources/hr/perform



Next Steps and Questions