



# Performance Management Training for PSA and Non-Aligned

**Department of Human Resources  
July 2018**

# Why Do It?

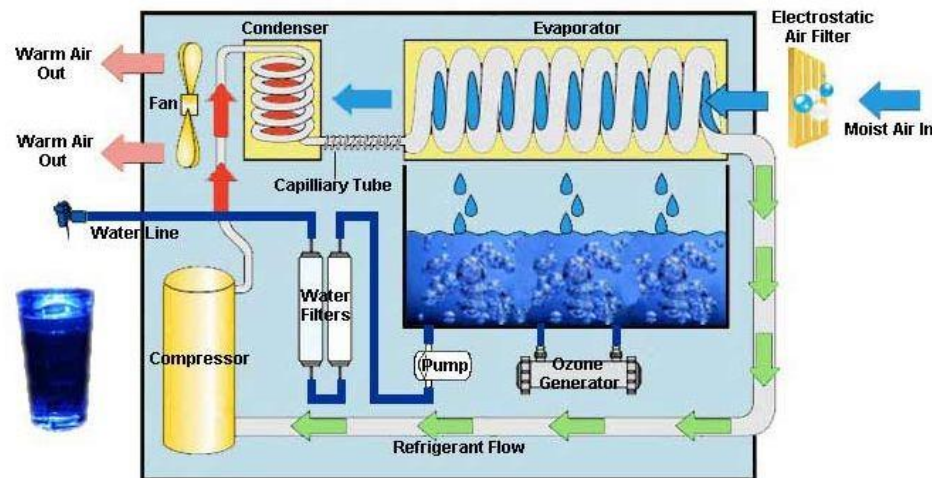


## ***Because:***

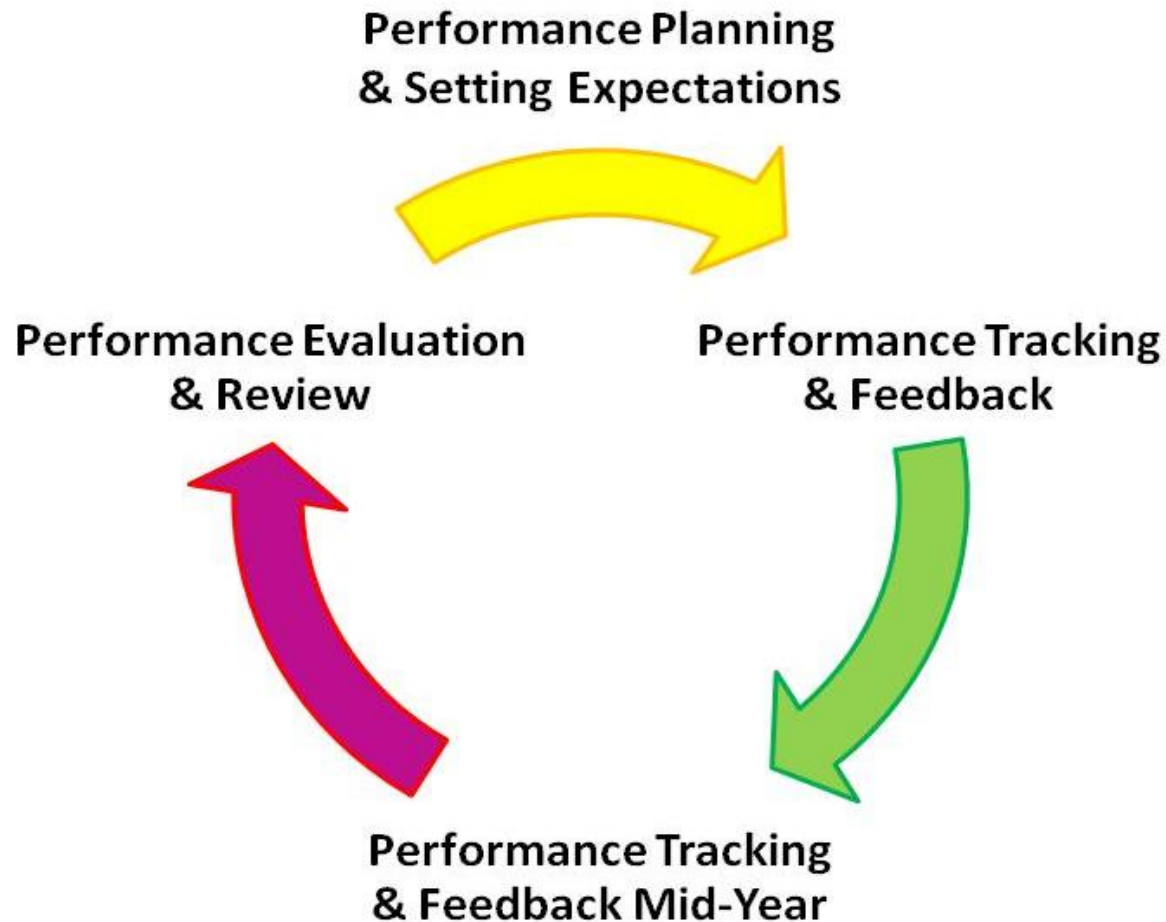
- Good, effective performance management is a key element in the morale and retention of our best people
- The performance review is a tool to help managers maximize the performance of their employees
- Feedback mechanism
- Formal codification of employee performance for a specified time period

# How the Process Should Work

- Clear expectations and performance goals established last year for FY18
- Regular status updates and feedback
- Annual feedback meeting
  - Review skills, accomplishments, areas for improvement, plan of action (goals)
- Performance and individual development goal setting for FY19



# Performance Management Cycle



# Performance Reviews

# Ratings Definitions

Please refer to the appropriate evaluation form (PSA and Non-Aligned) for rating definitions on:

- EE (Exceed Expectations) \*
- ME (Meets Expectations)
- DE (Did Not Meet Expectations)

# Rating Guidelines

- Rate results, not the person
- Rate the current performance year only
- Rate present performance, not potential
- Rate performance, not salary level or compensation
- Rate the employee's work as a whole
- Make thoughtful decisions, give yourself time to think
- Beware of managerial "guilt"



# Ways to Reduce Bias

- Have clear goals and performance expectations
- Have regular feedback meetings
- Base ratings on results and behaviors
- Have consistent standards for those being evaluated



# Potential Issues When There Is...

- No written performance plan
- No documentation of poor performance
- Little or no discussion of expectations
- Meeting focuses on “putting out fires”
- Little or no ongoing feedback on performance
- Short, perfunctory annual meeting focusing on merit pay



# Performance Reviews- What NOT to say

- If the employee has been out on a validated medical leave, do not mention this in the evaluation- the goals will need to be adjusted
- ADA Accommodations
- Unexcused absences, unless already discussed (with follow-up actions)
- Do not make the evaluation personal or about personality; support the review and feedback with observable, objective, and quantifiable data.

# Performance Evaluation Meeting

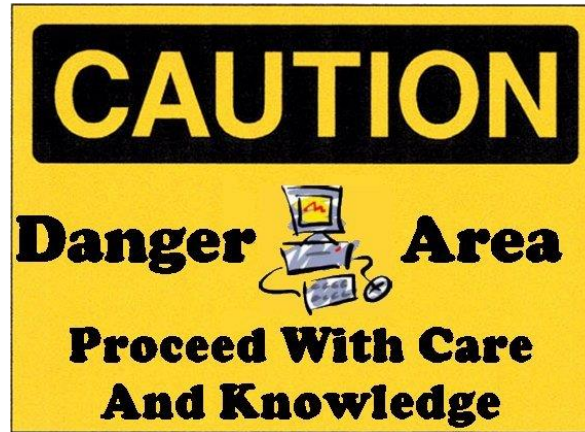
**NJIT**

New Jersey Institute of Technology

# Key Actions for Conducting Performance Evaluation Meeting

- Prepare for a focused discussion
- Set expectations
- Invite Discussion
- Share your core points
- Jointly decide next steps
- Summarize the core points

# Giving Feedback: Caution



- Can be a highly emotional meeting
- Stay calm: emotion fuels emotion
- Be respectful
- Discuss an employee's actions as much as possible
- Proceed slowly
- Do not threaten
- Offer guidance and support for corrective action

# Tips for Resolving any Disconnects

- Discuss only areas that relate to your core points
- Stick to facts
- Link areas of disconnect to the employee's or NJIT's goals
- Avoid lectures
- Remain open to revising your opinion

# Poor Performers: What to Do?

- It is your job to address the problem and develop a:
  - Detailed performance plan
  - Shortened review cycle
  - Clear, mutually determined remediation plan
  - Separate review and feedback, and...
- Check to ensure that the employee had:
  - ✓ Clear directions
  - ✓ Needed resources
  - ✓ Appropriate training
  - ✓ Ongoing feedback

# Ignoring Poor Performers

- Behavior is contagious
- Low work group morale
- Loss of respect of direct reports
- Overworked contributors
- High Attrition



# Outcome of Meeting

Direct report should have a clear idea of:

- Accomplishments and shortfalls
- Achievement of goals from last year?
- Strengths and development needs
- Areas for improvement
- What is required for excellence
- Goals and objectives for the new year

# Writing Performance Goals

# Definition

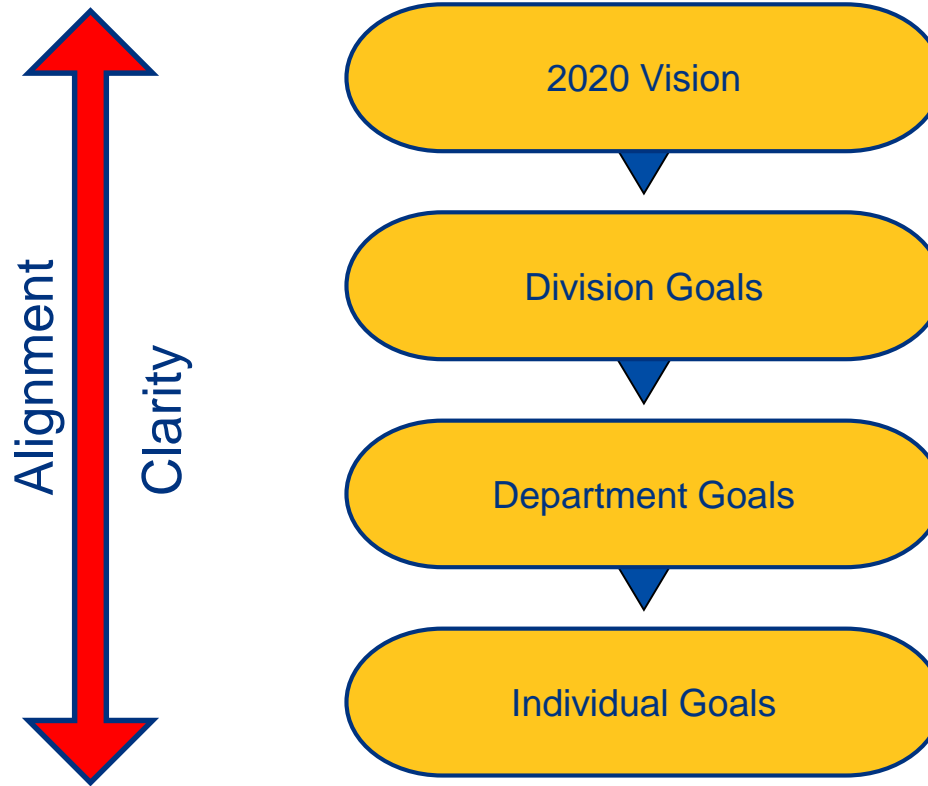
A goal is, “a statement that describes an action or task with a **measurable end result** and **timeframe for completion.**”

# Benefits to Goal Setting

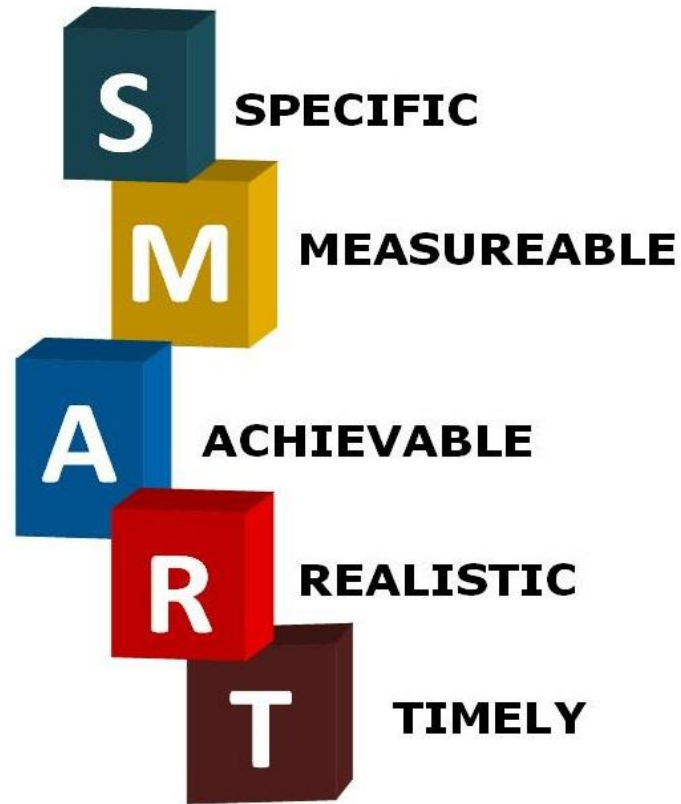
- Focuses your time and energy on actions that make a difference
- Helps you decide between conflicting priorities
- Ensures meaningful contributions
- Ensures actions are aligned with the 2020 Vision



# Setting Performance Expectations



# Setting SMART Goals



# Guidelines for Setting SMART Goals

*What:* define expectations in action-oriented terms

*How:* identify key behavioral expectations

*Who:* who is accountable

*When:* milestones and deadlines

*To what extent:* what does success look like

# Not “SMART”

Roll out a training program for all university faculty and staff.



# “SMART”

Based on the results of the needs analysis, and collaboration with the senior staff, roll out a comprehensive training program to all faculty and staff by end of FY19. There should be at least six programs; 3 programs geared toward all staff and 3 dedicated specifically for those who manage staff. Evaluation surveys should indicate participant satisfaction level at a minimum of 4.5 / 5.

# Individual Development Plan (IDP)

## Goals

- Focus on what can be done to increase effectiveness
- Highlight areas for professional growth, including new skill or knowledge
- Look to strengthen areas of current strength (making the strong, stronger)

***IDP goals are not performance goals, but are based on the competencies your position requires for success.***

# Development Strategies

- On the job
- Coaching
- Special assignments
- Presentations to group
- Cross-training in department
- Temporary assignment in another department
- Observation of “role model”
- Courses, seminars, workshops
- Professional group membership
- Independent study/reading

# IDP Examples

<b>IMPROVEMENT/DEVELOPMENT GOAL (Identify up to 3 development goals)</b>	<b>ACTION STEPS TO ACHIEVE GOAL</b>	<b>ACCOMPLISHMENT</b>
To become proficient in writing formulas in MS Excel	Participate in Lynda.com Excel Formula class, by 11/15/17	
To learn how to prepare and monitor/track the division budget	In FY18 assist budget director in monitoring division's FY18 budget and prepare the FY19 budget	

# Writing Your IDP Exercise

Write two development goals for yourself.

<b>IMPROVEMENT/ DEVELOPMENT GOAL</b> (Identify up to 3 areas for development)	<b>ACTION STEPS TO ACHIEVE GOAL</b>	<b>ACCOMPLISHMENT</b>
1.  2.		



# Thank You!

*For Assistance and Questions Please Contact Us:*

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NJIT

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