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 Planning & Setting Expectations

Performance Evaluation & Review

Performance Tracking & Feedback

Performance Tracking & Feedback Mid-Year
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
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

Alignment

Clarity

2020 Vision

Division Goals

Department Goals

Individual Goals
Setting SMART Goals

- SPECIFIC
- MEASURABLE
- ACHIEVABLE
- REALISTIC
- TIMELY
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

<table>
<thead>
<tr>
<th>IMPROVEMENT/DEVELOPMENT GOAL (Identify up to 3 development goals)</th>
<th>ACTION STEPS TO ACHIEVE GOAL</th>
<th>ACCOMPLISHMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>To become proficient in writing formulas in MS Excel</td>
<td>Participate in Lynda.com Excel Formula class, by 11/15/17</td>
<td></td>
</tr>
<tr>
<td>To learn how to prepare and monitor/track the division budget</td>
<td>In FY18 assist budget director in monitoring division’s FY18 budget and prepare the FY19 budget</td>
<td></td>
</tr>
</tbody>
</table>
## Writing Your IDP Exercise

Write two development goals for yourself.

<table>
<thead>
<tr>
<th>IMPROVEMENT/DEVELOPMENT GOAL (Identify up to 3 areas for development)</th>
<th>ACTION STEPS TO ACHIEVE GOAL</th>
<th>ACCOMPLISHMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Questions
Thank You!

For Assistance and Questions Please Contact Us:

• Bob Lazer- ext. 3143; lazer@njit.edu

• Lauren Rubitz- ext. 5524; rubitz@njit.edu