Performance Management Training for PSA and Non-Aligned

Department of Human Resources
July 2019

Performance Management

Objectives

- Discuss the importance and steps included in performance management

- Discuss performance evaluation and assessment

- Learn how to give meaningful feedback and how to conduct the feedback meeting

- Discuss handling poor performers/performance
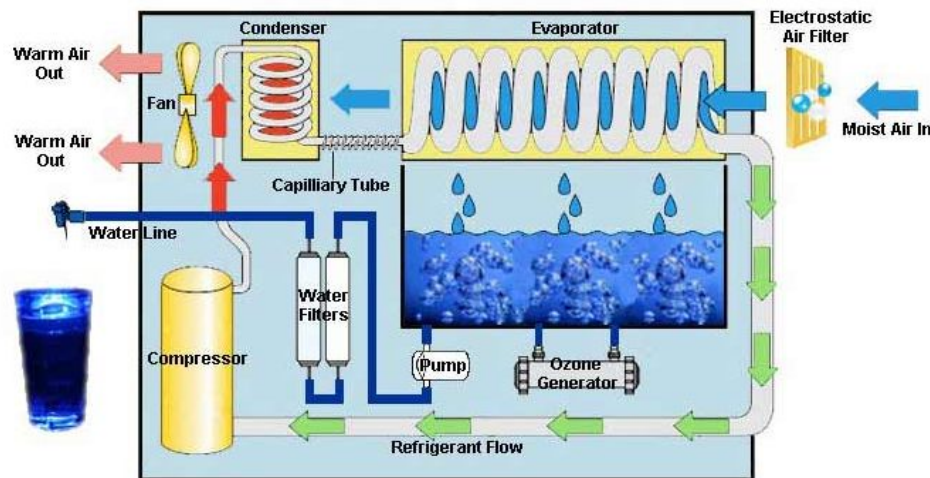
- Learn how to set and manage goals
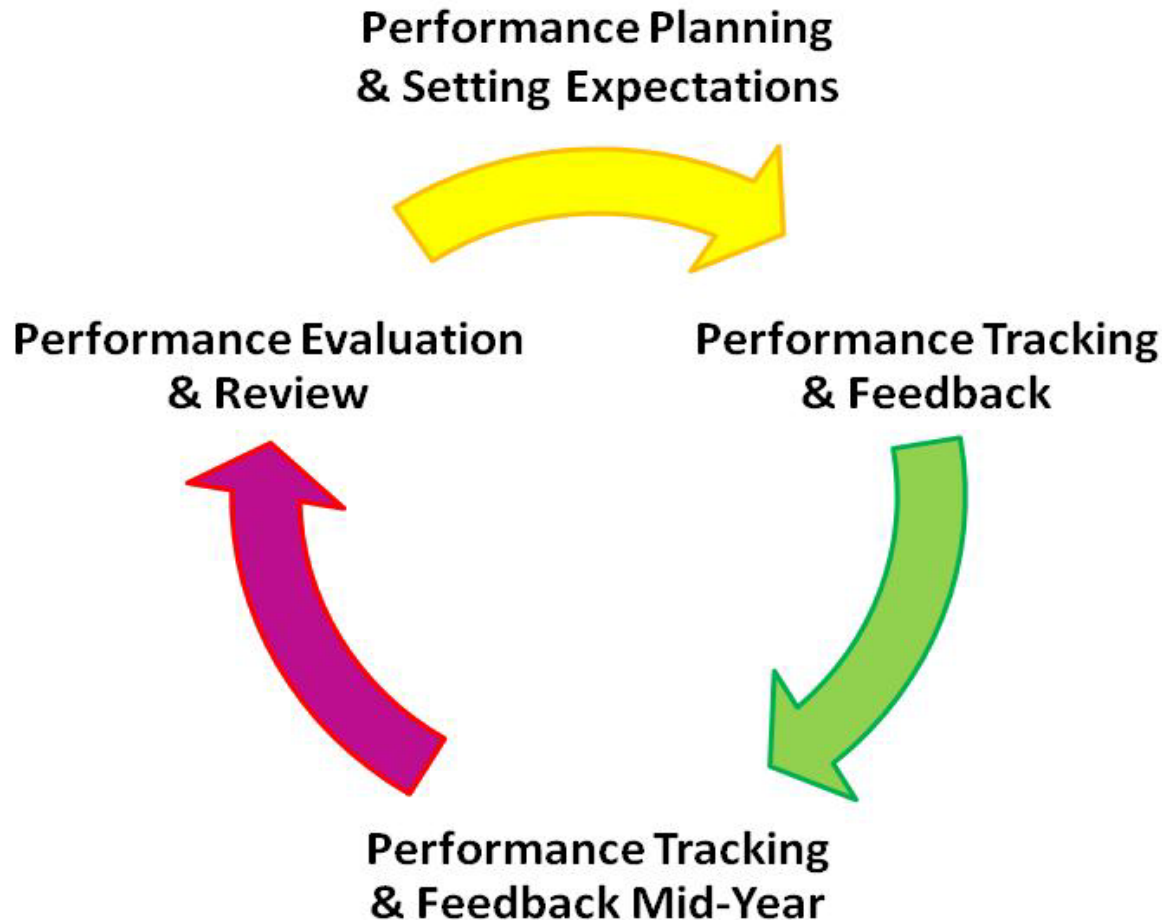
Why Do It?

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 FY19

- 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 FY20

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 a Collaborative 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

- 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.*"
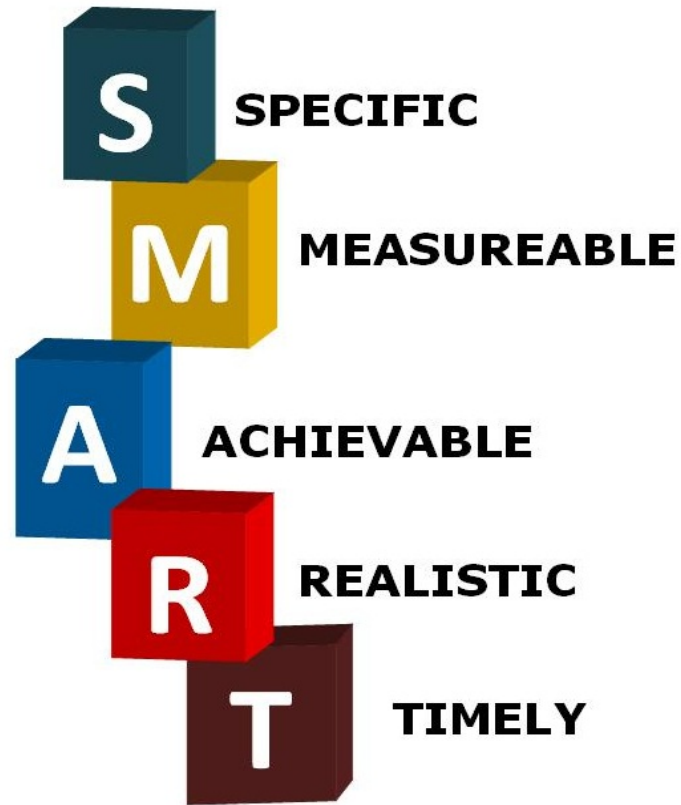
Benefits to Goal Setting

- 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

S SPECIFIC

M MEASUREABLE

A ACHIEVABLE

R REALISTIC

T TIMELY
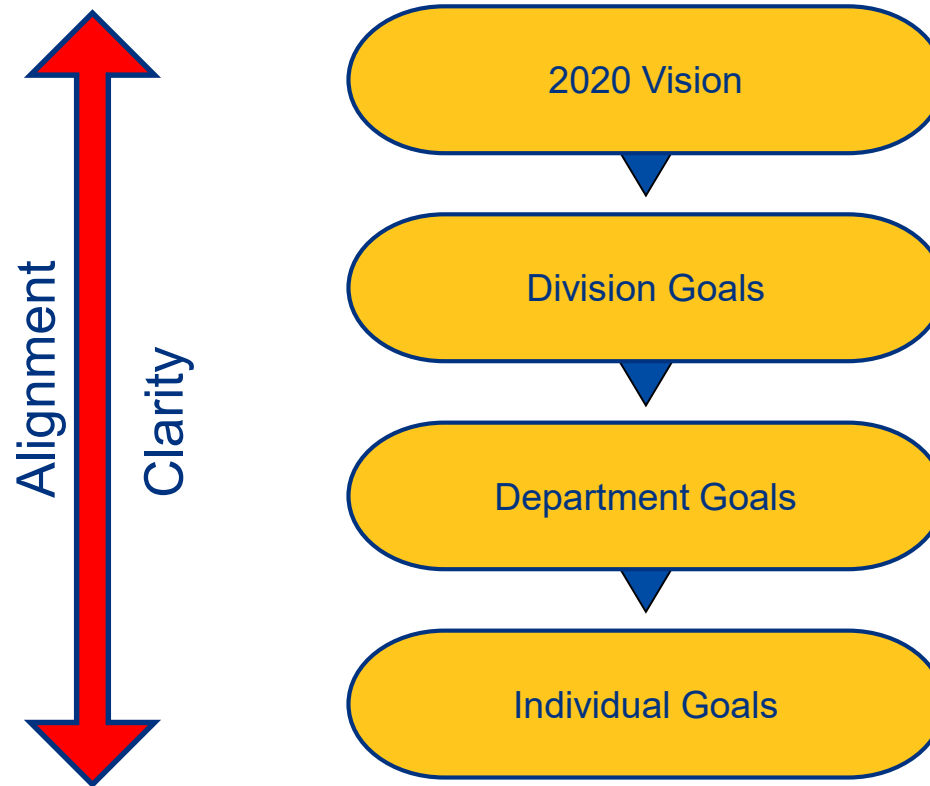
Guidelines for Setting SMART Goals

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 FY20. 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

IMPROVEMENT/DEVELOPMENT GOAL (Identify up to 3 development goals)	ACTION STEPS TO ACHIEVE GOAL	ACCOMPLISHMENT
To become proficient in writing formulas in MS Excel	Participate in Lynda.com Excel Formula class, by 11/15/19	
To learn how to prepare and monitor/track the division budget	In FY20 assist budget director in monitoring division's FY20 budget and prepare the FY21 budget	

Thank You!

For Assistance and Questions Please Contact Us:

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