Performance Management Training for PSA and Non-Aligned

Department of Human Resources

June 2021
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
Supervisor’s Roles and Responsibilities

- Collect data and appropriate performance information:
  - Meeting notes
  - Critical incidents
  - Information gathered from others who have worked with employee
  - Progress reports

- Be clear on your expectations and standards for the employee’s performance

- Write evaluation and responses to accomplishments:
  - Goals
  - Competencies

- Rate employee on overall performance

- Set performance goals/expectations and development needs for FY22. Conduct performance feedback discussion.
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 FY21
- 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 FY22
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
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 2025 Strategic Plan
Setting Performance Expectations

Alignment

Clarity

2025 Strategic Plan

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”

Spend less of the budget on supplies.

“SMART”

Reduce department’s supply cost by 10% by June 30, 2021.
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
- Observation of “mentor”
- 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 a on-line Excel Formula class, by 11/15/21. Course to be determined.</td>
<td></td>
</tr>
<tr>
<td>To learn how to prepare and monitor/track the division budget</td>
<td>In FY22 assist budget director in monitoring division’s FY21 budget and prepare the FY23 budget</td>
<td></td>
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Thank You!

For Assistance and Questions Please Contact:

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