Performance Management

Writing Performance Assessments and Goals
2014
Performance Management

Writing Performance Assessments and Goals

Agenda

1. Performance Management - general
2. UF Assessment Tool – Job categories and job ratings
3. Goal setting - general
4. SMART goals
5. Wrap up – questions
6. Shared best practices
Performance Management

Writing Performance Assessments and Goals

Objectives

1. Have a better understanding of the UF standards for assessing performance
2. Have a better understanding of how to write effective goals
3. Take away two new things you will use in this next evaluation period
I got a text message from our boss.

"Keep up WRK."

What does that mean?

You just got your annual performance review.
Performance Management

Provides the means to:

1. **Answer** the three most basic questions we all have as employees:
   - What am I supposed to be doing?
   - How well am I doing?
   - Does it matter to the libraries?

2. **Recognize** achievements.

3. **Assess** performance — overall and components

4. **Set** performance goals.

5. **Discuss** how goals reflect departmental and library mission.
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When done properly

Puts the employee in the best possible position to be successful!
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Stakeholder Roles

- **Staff members** – at all levels are the planners and drivers of their own careers and are accountable and acknowledge their role.

- **Supervisors** – act as coaches of their staff and provide them with guidance and a fair and comprehensive assessment.

- **2nd Level Supervisors** – provide feedback and direction to the team and ensure the employee receives a fair and comprehensive assessment. Evaluates the evaluator.
Performance Management
Stakeholder Roles

- **Human Resources Office** – provides counsel at all levels and reviews documents for equity and tracking purposes.
- **Dean** – supports the process and expects it will be done well.
Three formats for UF appraisals

① Non-exempt TEAMS and all USPS employees - form

② Exempt TEAMS employees – narrative – letter & cover sheet

③ Faculty - letter
Performance Assessment
Performance Assessment

Key elements

1. Position description
   Duties – weight varies
   - Time – how much time is dedicated
   - Frequency – how often
   - Consequences – what are the consequences if the duty is not carried out properly
Performance Assessment

Position Description Example

Library Assistant 2 - Cataloging

45% - Cataloging and problem resolution
25% - Physical processing
10% - Distribution and problem resolution
15% - Computer liaison
5% - Other duties and staff development
Performance Assessment

Key elements

2. Last year’s goals
   critical to assessment
   – Collaborate with other circulation supervisors to design an online staff guide for student assistants by July 1.
Performance Assessment

Key elements

3. Assessment categories and rating
Performance Assessment

Job Categories

The University of Florida has established five job categories.

- Work Performance
- Attendance/Reliability
- Customer Service
- Initiative/Productivity
- Teamwork & Interpersonal Skills
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Job Ratings
The University of Florida has established five categories for describing performance standards – job ratings.

Exceeds
Above Average
Achieves
Minimally Achieves
Below
Work Performance

- The skills
- The knowledge
- The abilities
- How the job is performed
- The nuts and bolts of the job

Exceeds – handles all aspects of position expertly, improves processes and goes out of ones’ way to contribute in other areas – available to train others and take on additional responsibilities

Above Average – handles all aspects of position with little instruction and coaching – goes beyond expectations – available to help others

Achieves – competently performs all job duties – achieves goals – working knowledge of job – there are areas that can be improved

Minimally Achieves – does not consistently meet performance standards – requires frequent instruction – has difficulty understanding – makes effort to learn & improve

Below performance standards – frequently unable to perform job duties – does not have the skills necessary for position
Attendance/Reliability

- Attendance
- Task completion
- Follow through
- Accuracy in work product

Exceeds – excellence attendance – can be relied on to take on projects and follow through – minimal supervision needed – task completed correctly and with no issues

Above Average – good attendance – can be counted on to complete tasks accurately and in designated time – knows when to ask for input

Achieves – adheres to attendance policies – able to complete tasks and follows through – minimal errors

Minimally Achieves – frequently absent or tardy and does not follow guidelines – tasks are not often completed timely or accurately – unreliable

Below performance standards – excessive absences and does not follow established procedures – tasks are not completed – unacceptable number of errors – cannot count on job being done
Customer Service

- Assistance
- Presentation/Demeanor
- Communication/Respect
- Service
- Phone manner
- Electronic communication

Exceeds – goes the extra mile to make sure the customer is satisfied – communicates clearly – takes initiative to improve services – creates pleasant environment to work in

Above Average – provides customers with a positive experience, pleasant and respectful – communicates very well

Achieves – assists customers when needed – responds to inquiries – communicates clearly – courteous and respectful

Minimally Achieves – not always helpful to customers – communication unclear at times – inconsistent service provided – not reliable

Below performance standards – unprofessional demeanor – customers do not receive needed service – communicates ideas poorly – unprofessional
Initiative/Productivity

- Motivation
- Organizational skills
- Vision
- Work volume
- Work accuracy

Exceeds – innovative – visionary – exceptional organization skills that spill beyond the individual’s work – looks at processes – volume and accuracy of work is impressive

Above Average - very productive – motivated and requires little supervision – prioritizes workflow and projects – takes on additional responsibilities to accomplish tasks

Achieves – adequately provides input – occasionally shares new ideas – needs some supervision to be productive – self motivated when project is of interest

Minimally Achieves – organizational skills are lacking – work volume suffers – un motivated – requires frequent input and prodding from supervisor -

Below performance standards – avoids responsibility – constant supervision needed – not productive or reliable – relies on others to get job done
Teamwork & Interpersonal Skills

- Cooperation
- Collaboration
- Flexibility
- Consensus
- Supportive

Exceeds – motivates self and others – expert consensus builder – supportive of others and flexible– assumes leadership role – able to set team goals and motivate team to perform

Above Average – works collaboratively – understands group dynamics – works to build team – often volunteers to lead projects and set goals – seeks feedback

Achieves – supportive of team projects and goals – assists as needed – contributes ideas – shows willingness to listen and be flexible

Minimally Achieves – unreliable in ability to be cooperative and flexible – sometimes causes rifts in working group – not always supportive of new procedures or projects

Below performance standards – creates conflict – responds negatively to feedback – unsupportive of organizational goals.
Performance Assessment
Best Practices

Reinforce positive behaviors
Redirect where needed
Be frank
Give examples
Focus on improvement – no criticism
Focus on behavior – not attitude
Avoid generalities
Use the 1st person
How has impacted department – why matters
Performance Assessment

Performance Review

Do you have any weaknesses that need improvement?

Sometimes I work so fast that I become invisible.

If I seem blurry right now, it's because I'm multi-tasking. Once a year is way too often for this.
Performance Goals
“If you don’t know where you’re going, the best made maps won’t help you get there.”

Robert Mager, psychologist, writer, educator
Performance Goals

Performance goals are based on the position description and outline the objectives for the period with specific activities to be performed. These are discussed with the employee who should be encouraged to contribute.
Performance Goals

Distinct from daily or routine activities and job duties

• Duty
  – 45% Cataloging

• Goal
  ✓ Continue cataloging
  ✓ By the end of the calendar year catalog all the cartoon books from the 1940s
Performance Goals
Considerations

• Review position description
• Review prior year’s goals
• Review employee’s goals if provided
• Have a conversation with employee
• Consider training needs
• Consider departmental goals and the broader picture
# Developing Goals

Performance Goals must be:

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<td>Outline exactly what you hope to accomplish so that both the staff member and supervisor can see clearly whether or not the objective has been achieved.</td>
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<td>There must be some way of measuring and verifying whether the objective has been achieved and to what level.</td>
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<td>The objectives must be relevant to the level at which the individual is at in his/her career, to the priorities and workload of the specific department.</td>
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<td>Attainable; not so lofty that you can’t achieve them and not so simple that you won’t be challenged.</td>
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<td>Need to have clear time frames attached to them.</td>
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Performance Goals

Develop three new trainings.

- One training on improving presentation skills, one on emergency procedures and one on customer service.

- These trainings should be delivered in April, August and January respectively.
Performance Goals

Collaborate with other circulation supervisors to design an online staff guide for student assistants.

- The guide should include links to key documents and other resources.
- And should be available for Fall 2012 incoming student assistants.
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Performance Goals

YOU HAVE FAILED TO MEET A GOAL SET BY OUR CEO.

DO YOU MEAN THE IMPOSSIBLE GOAL, THE ILL-ADVISED ONE, OR THE ONE YOU DIDN'T TELL ME ABOUT?

I FIGURED OUT WHAT'S WRONG WITH LIFE: IT'S OTHER PEOPLE.
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One new thing you can use in the next evaluation period?

- Performance Assessments
- UF’s job categories and job ratings
- How to write SMART goals
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Questions?

– Thank you!