New myPerformance Participants – FY17
myPerformance Tool

• myPerformance is an online performance management tool (access through myHR)

• Enables users to:
  – Streamline the performance appraisal process
  – Ensure compliance with University policy, HR-501
  – Provide clarity and consistency
  – Deliver ongoing feedback and coaching
  – Set goals and development plans
  – Assess group performance needs

• Provides greater consistency within and across colleges, schools, and divisions
Several groups participated in the FY14, FY15, and FY16 appraisal processes, including:

- College of Business
- College of Education
- Finance
- Libraries
- Operations
- Provost (Human Resource Services, Mizzou Online, Thompson Center)
- School of Medicine
- Student Affairs
- University Advancement
Appraisal Criteria
• Appraisal forms for all employees consist of the following rated criteria:

  – Success Factors
    • Accountability
    • Collaboration
    • Communication
    • Customer Focus
    • Diversity & Inclusion
    • Judgment
    • Time Management

  – One optional fill in the blank section
    • Non-union eligible only
    • Equally weighted
    • Can be used to capture another competency, job duty, or as a summary of overall goal completion to name just a few options
FY16 Appraisal Forms

- Appraisal forms are assigned based on the job title’s subfunction within the organization
  - **Union Eligible**
    - Food Service Worker II, Power Plant Electrician
  - **Support Task Expert**
    - Office Support Assistant I, Student Recruitment Specialist
  - **Subject Matter Professional**
    - Instructional Designer, Advancement Officer
  - **Management**
    - Manager II Student Support Services, Associate Registrar
  - **Leadership**
    - Director II Finance, Director IT
COMMUNICATION: Provides information clearly and accurately in various settings, ensuring understanding and participation.

**Union-Eligible**
- Documents work clearly, correctly, and completely using the appropriate method
- Exchanges information in a straightforward, clear manner; changes tone and message as necessary
- Demonstrates thoughtfulness and attention when listening to others, responding appropriately to questions

**Leadership**
- Communicates highly complex or unusual circumstances appropriately, ensuring that content is shared and understood at all function/department levels
- Uses a variety of communication tactics/methods and adjusts messages and tone to more effectively communicate to various function/department levels
- Models and encourages others to actively listen, allow for questions and discussion, and reflect on key messages, while ensuring stakeholders has a chance to provide input

**Behavioral descriptions vary by subfunction**
Rating Scale and Overall Score

• Each component of the appraisal is rated on a five point scale
  – Outstanding
  – Exceeds Expectations
  – Successful
  – Improvement Expected
  – Unacceptable

• Overall Scores are based on the calculated average
Support Task Expert Performance Appraisal FY16

Demographics

Name: 

Employee ID: 

Job Title: 

Supervisor: 

Department: 

General Instructions

The annual Performance Appraisal is intended to summarize employee performance over the past year and provide an opportunity to plan for next year. Use the rating scale definitions below to help accurately document performance. Use the comment boxes to provide specific examples that support the rating. A comment must be provided if a rating of “Outstanding” or “Unacceptable” is given.

Rating Scale

Outstanding
Is a role model in the job. Exhibits mastery in all aspects of the job. Puts the customer at the center of every activity. Steps outside of existing responsibilities to add value to the University. Identifies breakthrough concepts. Is sought out by colleagues for advice on issues. Models the values of the University on a daily basis. Is in sync with the strategic direction of the University. Is universally regarded by others as a knowledgeable resource and true asset. Acts as a mentor, guide, and teacher. Seeks new and improved ways to perform the job. Openly shares information and resources. Actively promotes cooperation, understanding, and teambuilding.

Exceeds Expectations
Performance consistently exceeds expectations in specified criteria. Sets and meets challenging professional goals and shows initiative in meeting them. Assumes extra responsibilities and participates in projects often. Proactive in planning, problem solving and initiating solutions within work group. An exceptional contributor to the success of the work group and organization.

Successful
Performance consistently meets expectations in specified criteria. Requires minimal supervision and complies with work rules and regulatory requirements. Performance consistently meets the demands placed upon the position. Reliably completes routine assignments in an accurate and timely fashion. Assumes additional responsibilities when requested or assists in extra project work. Meets the University’s high performance standards. Contributes positively to the success of the work group and organization.

Improvement Expected
Performance meets some but not all expectations in specified criteria. Performance requires occasional supervisory intervention. Does not consistently complete job assignments in some areas in an accurate and timely fashion. Performance or behavior causes occasional problems for students, customers, department/unit and/or co-workers.

Unacceptable
Overall performance does not meet expectations in specified criteria. Often requires supervision, redirection and re-instruction. Does not consistently complete job assignments in an accurate and timely fashion. Performance or behavior causes problems for students, customers, department/unit and/or co-workers.
myPerformance Appraisal Elements

myPerformance appraisal forms differ based upon an employee’s assigned subfunction within the organization but all utilize a consistent rating scale. A complete list of titles and job codes along with the associated subfunction (union eligible, support task expert, subject matter professional, management, and leadership) can be found in the Related Resources to the right.

The appraisal forms for union eligible employees, support task experts, subject matter professionals, management, and leadership are composed of a set of competencies, or Success Factors. The Success Factors have been scaled to better represent each subfunction’s role in the organization. Success Factors describe how you do the various duties of your job.

- **Accountability**: Owns decisions, outcomes, work products, etc. that are within the scope of one’s role.
- **Collaboration**: Works inclusively to build trust and accomplish tasks, goals, and initiatives.
- **Communication**: Provides information clearly and accurately in various settings, ensuring understanding and participation.
**myPerformance**

**Rating Definitions**

**Outstanding**
- Is a role model in the job.
- Exhibits mastery in all facets of the job.
- Puts the customer at the center of every activity.
- Steps outside of existing responsibilities to add value to the University.
- Identifies and breaks through concepts.
- Seeks new and improved ways to perform the job.
- Actively promotes cooperation, understanding and team building.
- Openly shares information and resources.

**Exceeds Expectations**
- Performance consistently exceeds expectations in specified criteria.
- Assesses extra responsibilities and participates in projects often.
- Pragmatic in planning, problem solving and innovating solutions within work group.
- Exceptional contributor to the success of the work group and organization.

**Successful**
- Performance consistently meets expectations in specified criteria.
- Requires minimal supervision and complies with work rules and regulatory requirements.
- Performance consistently meets the demands placed upon the position.
- Prioritizes routine assignments in an accurate and timely fashion.
- Assumes additional responsibilities when requested or assists in extra project work.
- Meets the University’s high performance standards.
- Contributes positively to the success of the work group and organization.

**Improvement Expected**
- Performance nears some but not all expectations in specified criteria.
- Performance requires occasional supervisory intervention.
- Performance consistently meets job assignments in some areas in an accurate and timely fashion.
- Performance or behavior causes occasional problems for students, customers, department/unit and/or co-workers.

**Unacceptable**
- Overall performance does not meet expectations in specified criteria.
- Often requires supervision, redirection and/or re-instruction.
- Performance consistently makes job assignments in an accurate and timely fashion.
- Performance or behavior causes problems for students, customers, department/unit and/or co-workers.

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**Success Factor Definitions: Support Task Expert**

**ACCOUNTABILITY:** Owns decisions, outcomes, work products, etc. that are within the scope of one's role.
- Is attentive and takes responsibility and ownership for tasks, decisions, and related outcomes.
- Delivers consistent, accurate results, meeting deadlines and expectations and ensuring team and/or supervisor are aware of completion and/or roadblocks.
- Holds individual decisions, outcomes, and work products, monitoring them according to predetermined measures.

**Collaboration:** Works inclusively to build trust and accomplish tasks, goals, and initiatives.
- Willingly shares relevant information with others in a timely manner and offers support whenever possible.
- Recognizes own role on the team and how it contributes to the overall outcomes of the team, ensures own interactions with team are collaborative and respectful.
- Builds relationships with colleagues throughout working cooperatively towards accomplishing objectives, being reliable, and demonstrating trust.

**Communication:** Provides information clearly and accurately in various settings, ensuring understanding and participation.
- Delivers clear and concise messages via the appropriate method to the situation.
- Considers the tone of messages when preparing and delivering information; modifies messages as appropriate.
- Demonstrates attention during discussions by taking notes, asking questions, and rephrasing information to ensure understanding.

**Customer Focus:** Understands, anticipates, and appropriately responds to internal and/or external customers’ needs.
- Asks the right questions and actively listens to understand needs and requests; responds and takes action appropriately.
- Responds to standard, routine requests in a consistent and reliable manner; follows quality standards and uses appropriate service and quality techniques.
- Works with supervisor, customer, and/or team to meet both customer and university expectations.

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**Diversity & Inclusion:** Values differences by ensuring that all people are included, respected and can engage in their work to the best of their abilities.
- Engages in ongoing professional development in diversity and inclusion initiatives and applies that knowledge and awareness to one’s work and interactions.
- Uses inclusive language when referring to and interacting with individuals from different identity groups (i.e., disability, race, gender, etc.) speaks up and notifies supervisor/manager when actions or environment hinder diversity and inclusion efforts.
- Provides support that meets the needs of people from different backgrounds, thoughts, etc.; appropriately demonstrates equality and inclusion when providing support.

**Judgment:** Makes appropriate decisions and evaluations risk and uncertainty to create optimal outcomes.
- Collects and organizes available information and uses routine procedures to make decisions.
- Demonstrates knowledge of and compliance with standards, protocols, and procedures; escalates complex decisions to appropriate team members and balances making decisions independently versus seeking input; considers the short- and long-term effects of own decisions.

**Time Management:** Actively manages time to most effectively accomplish work, projects, objectives, and goals.
- Works with supervisor to set goals and priorities for own work; evaluates urgency and importance to prioritize tasks appropriately.
- Demonstrates reliability in meeting deadlines and accomplishing tasks; persists until a problem is solved or goal is achieved.
- Adapts to shifting priorities as a result of new ideas, processes, and/or working styles.
Appraisal Process
The basic steps in the myPerformance system are:

- Takes place March 15th – June 30th
- Step due dates are set by unit
- Email notifications at each step

1. Employee writes self appraisal
2. Evaluator drafts appraisal
3. Second level manager approves appraisal
4. Evaluator and employee discuss appraisal
5. Employee comments and completes electronic sign-off
6. Evaluator reviews comments and finalizes
Several methods of calibration are included in the standard myPerformance process:

- Rating scale
- Success Factors
- Second level approver

Other options to calibrate:

- Consistency with fill in the blank section
- Pre-defining ‘Successful’ behaviors as a group
- Reviewing ratings across workgroups
Using myPerformance
Year Round
Using myPerformance Year Round

• Employees and Supervisors can utilize the system throughout the year
  – Goals
  – Development Plans
  – Feedback
    • Journal Notes
    • Manager Notes
  – Access Past Evaluations
  – Documents
myPerformance Appraisal Elements

Appraisal forms differ based upon an employee's assigned subfunction within the organization but all utilize a consistent rating scale. A complete list of titles and job codes along with the associated subfunction (union eligible, support task expert, subject matter professional, management, and leadership) can be found in the Related Resources to the right.

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## My Performance

### Goals

<table>
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<tr>
<th>Employee Goal</th>
<th>% Complete</th>
<th>Weight</th>
<th>Entered By</th>
<th>Modified Date</th>
<th>General Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test 1</td>
<td>0%</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Legend:**
- **On Track**
- **At Risk**
- **Not on Track**
- **No Flag Set**
- **Linked to Organizational Goal**
Adding Goals

Add Goal

- Employee:
- Weight:
- Title:
- Description/Metric:
- Action Steps:
- Progress on Action:
- Linked To: None
- Category: None
- Start Date:
- General Timeline:
- Completed Date:
- Status: Select
- Percent Complete: 0%
- Progress Flag:
  - On Track
  - At Risk
  - Not on Track
  - No Flag Set
- Last Modified: 6/7/16
- Notes:
  - Add a note...
Development Plans

My Performance

Use this section to view and manage your personal development plans.

Development Plans

<table>
<thead>
<tr>
<th>Development Plan</th>
<th>Competency</th>
<th>Status</th>
<th>Entered By</th>
<th>Due Date</th>
<th>Complete</th>
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</thead>
<tbody>
<tr>
<td>Test</td>
<td>Collaboration</td>
<td>In Progress</td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

Add
Delete
Options

Displaying 1 - 1 of 1
Adding Development Plans

Add Development Plan

Details

Employee:
  * Title:

Description/Metric:

Related Competency:

Entered By:

Created Date:

General Timeline:

Status: Not Started

Completed Date:

Notes

Add a note...
## Feedback

### My Performance

<table>
<thead>
<tr>
<th>Note</th>
<th>Sharing</th>
<th>Entered By</th>
<th>Created</th>
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</thead>
<tbody>
<tr>
<td>Journal Note</td>
<td>Test journal note</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Add Options:**
- Journal Note
- Manager Note
Share feedback with management (Disclaimer: Checking this box allows your supervisor to have access to this note. Even if you choose to grant access, the note may not be monitored. Send any concerns directly to your supervisor or to the appropriate office, such as the Title IX Coordinator for claims of sex discrimination)
Adding Manager Notes

Add Feedback - Manager Note

For: Find Recipients

Title: Manager Note

Share feedback with employee

Last Modified:

OK Cancel
Accessing Past Evaluations
## My Performance

Your personal upload limit is 10 MB.

### Documents

<table>
<thead>
<tr>
<th>Document</th>
<th>File Size</th>
<th>Date</th>
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<tbody>
<tr>
<td>Test</td>
<td>333 KB</td>
<td></td>
</tr>
</tbody>
</table>

[Add Document]  [Delete]  [Options]
Adding Documents

My Performance

Your personal upload limit is 10 MB.

Documents

Add Document

Title: 
Filename: 

Add Delete Options

Displaying 1 - 1 of 1

Date: 1/28/15

Browse...
Training Materials

myPerformance
myPerformance

myPerformance

myPerformance is an online performance management tool for all campuses of the University of Missouri. Training sessions are available for employees, supervisors, and those with administrator access in each college, school, or division. For additional information regarding training, please contact groshongs@missouri.edu.

Training Materials

For Everyone

- Glossary of terms
- FY16 Improvements to myPerformance presentation slides
- VIDEO: FY16 myPerformance Overview
- Suggested myLearn Success Factor courses
- How to Add and Edit Performance Goals
- VIDEO: Using myPerformance Year Round
- VIDEO: The Performance Appraisal Process

For Employees

- Employee Training presentation slides
For Supervisors

- Supervisor Training presentation slides
- Using Third Party Review (optional)
- VIDEO: How to Create Reports
- myLearn resources: Performance Appraisal Essentials: Conducting Traditional Appraisals and Preventing Problem Performance

For Second Level Approvers

- Second Level Approver Guide
- VIDEO: How to Create Reports

For HR Administrators

- HR Admin Manual
- Reporting Guide

Please contact myPerformance@missouri.edu with any specific questions or call the HR Service Center at (573) 884-6996 for assistance with logging into myPerformance.