Based on feedback from FY14 participants, we’ve...

- Added single sign on
- Leveled the available forms (based on GGS grade)
- Allowed additional personalization of forms
  - Fill in the blank Key Responsibilities/Performance Goals
  - Integrated MU and division-specific initiatives into Performance Goals
- Improved tool functionality for raters
  - Enabled the “Comment Helper” feature
  - Clarified terminology within the tool
- Extended the appraisal period
<table>
<thead>
<tr>
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<th>Performance Goals (1+)</th>
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<th>Leadership Competencies (5)</th>
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Key Responsibilities

- Consider major responsibilities, what takes the most time
- Combine like responsibilities, prioritize, focus on three to seven
- Share ideas with others

For example:
- Copies of work samples
- Feedback from committees or other campus involvement
- Emails from customers
- Job metrics
- Self-appraisals
- Informal feedback documentation
- Peers of the employee
Success Factors

- Accountability
- Collaboration
- Communication
- Customer Focus
- Judgment
- Quality
- Time Management
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Performance Goals or Key Responsibilities

- Customized weighting options (GGS grades 11+)
- Option to link to MU goals and initiatives
Leader Competencies

- Culturally Competent
- Performance Driven
- People Centered
- Values Oriented
- An Integrative & Strategic Leader

Performance Driven

- Drives excellence and sets high standards.
- Communicates explicit expectations.
- Demands accountability.
- Promotes innovation.
- Demonstrates results orientation.

Self: N/A

Comments:
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Self-Appraisal (optional)

- Opportunity to highlight achievements
- Give specific, objective examples
- Basis to discuss development
Development Plans (optional)

Development Plans
• Guide career growth
• Help with succession planning
• Optional Section
Creating a Plan: Step by Step

1. Knowledge, skill, or competency to develop
2. Measures to be used
3. Resources required
4. Completion date
Setting Performance Goals

**S**pecific
- Emphasize action/ results
- Use specific action verbs

**M**easureable
- Enables you to track goal
- Helps you know when goal is complete

**A**ttainable
- Consider resources available
- Helps you prioritize

**R**elevant
- Meaningful to you and the University
- Consistent with department goals

**T**ime-bound
- Includes start and end points
- Timelines need to be measurable
Built-in to myPerformance tool:

- Rating Scale
- Success Factors
- 2\textsuperscript{nd} level approver

Further options to calibrate:

- Key Responsibilities
- Defining ‘successful’ behaviors
- Ratings
  - Overall Rating, by Success Factor, across similar roles
Performance Appraisal Process

1. Employee writes his/her self appraisal
2. Manager drafts appraisal for each employee
3. Manager incorporates calibration feedback into each appraisal and clicks "Submit" in the tool
4. Manager’s manager approves appraisal
5. Manager discusses appraisal with employee
6. Manager finalizes the appraisal
7. Employee may add comments then affirms receipt of appraisal
8. Manager reviews employee comments and finalizes the process

Process opens April 1

Process closes June 30
The Rating Scale

- Outstanding
- Exceeds Expectations
- Successful
- Improvement Expected
- Unacceptable
<table>
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<tr>
<th>Performance</th>
<th>Assumptions</th>
<th>Reliably</th>
<th>Contributions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consistently achieves Performance Goals, Key Responsibilities and Success Factors</td>
<td>Assumes additional responsibilities when requested or assists in extra project work</td>
<td>Reliably completes routine assignments in an accurate and timely fashion</td>
<td>Contributes positively to the success of the work group and organization</td>
</tr>
<tr>
<td></td>
<td>Reliably completes routine assignments in an accurate and timely fashion</td>
<td></td>
<td>Performance consistently meets the demands placed upon the position</td>
</tr>
</tbody>
</table>
# Exceeds Expectations

Performance **consistently exceeds** Performance Goals, Key Responsibilities and Success Factors

Assumes **extra responsibilities** and participates in projects often

**Sets and meets** challenging professional goals and **shows initiative** in meeting them

**Proactive** in planning, problem solving and initiating solutions within work group

An **exceptional contributor** to the success of the work group and organization
<table>
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<tr>
<th>Is a <strong>role model</strong> in the job</th>
<th><strong>Seeks new and improved ways</strong> to perform the job</th>
<th>Is regarded by others as a <strong>knowledgeable resource</strong></th>
</tr>
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<tr>
<td><strong>Exhibits mastery</strong> in all facets of a job</td>
<td>Puts the <strong>customer</strong> at the <strong>center</strong> of every activity</td>
<td>Acts as a <strong>mentor, guide and teacher</strong></td>
</tr>
<tr>
<td><strong>Steps outside of existing responsibilities</strong> to add value to the University</td>
<td><strong>Is sought out by colleagues</strong> for advice on issues</td>
<td><strong>Openly shares</strong> information and resources</td>
</tr>
<tr>
<td><strong>Is in sync</strong> with the strategic direction of the University</td>
<td><strong>Identifies breakthrough concepts</strong></td>
<td><strong>Actively promotes cooperation, understanding and teambuilding</strong></td>
</tr>
<tr>
<td>Improvement Expected</td>
<td></td>
<td></td>
</tr>
<tr>
<td>----------------------</td>
<td>--</td>
<td></td>
</tr>
<tr>
<td><strong>Performance</strong> meets some but not all performance goals, key responsibilities or Success Factors</td>
<td><strong>Does not consistently complete job assignments</strong> in some areas in an accurate and timely fashion</td>
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</tr>
<tr>
<td>Performance <strong>requires occasional supervisory intervention</strong></td>
<td><strong>Performance or behavior causes occasional problems</strong> for students, customers, department/unit and/or co-workers</td>
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Overall performance does not meet performance goals, key responsibilities or Success Factors

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<td><strong>Overall performance does not meet performance goals, key responsibilities or Success Factors</strong></td>
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<tr>
<td><strong>Does not consistently complete job assignments in an accurate and timely fashion</strong></td>
</tr>
<tr>
<td><strong>Often requires supervision, redirection and/or re-instruction</strong></td>
</tr>
<tr>
<td><strong>Performance or behavior often causes problems for students, customers, department/unit and/or co-workers</strong></td>
</tr>
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