myPerformance Program
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
Evaluating Your Employees Using myPerformance
## myPerformance Forms

<table>
<thead>
<tr>
<th>Role</th>
<th>GGS Grades</th>
<th>Key Responsibilities (1 to 7)</th>
<th>Performance Goals (1+)</th>
<th>Success Factors (7)</th>
<th>Leadership Competencies (5)</th>
</tr>
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<tbody>
<tr>
<td>Employee</td>
<td>1 – 10</td>
<td>✓</td>
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<tr>
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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:
## myPerformance forms

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Self-Appraisal (optional)

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

- Guide career growth
- Help with succession planning
- Optional Section
Calibration

Performance Calibration
• Comparing individuals using consistent performance criteria

Why Calibrate?
• Drives talent awareness
• Improves accuracy and consistency
• Builds accountability and ownership
• Drives recognition and rewards
Calibration

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

<table>
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<tr>
<th>Step</th>
<th>Description</th>
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<tbody>
<tr>
<td>1</td>
<td>Employee writes his/her self appraisal</td>
</tr>
<tr>
<td>2</td>
<td>Manager drafts appraisal for each employee</td>
</tr>
<tr>
<td>3</td>
<td>Manager incorporates calibration feedback into each appraisal and clicks &quot;Submit&quot; in the tool</td>
</tr>
<tr>
<td>4</td>
<td>Manager’s manager approves appraisal</td>
</tr>
<tr>
<td>5</td>
<td>Manager discusses appraisal with employee</td>
</tr>
<tr>
<td>6</td>
<td>Manager finalizes the appraisal</td>
</tr>
<tr>
<td>7</td>
<td>Employee may add comments then affirms receipt of appraisal</td>
</tr>
<tr>
<td>8</td>
<td>Manager reviews employee comments and finalizes the process</td>
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**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** consistently achieves** Performance Goals, Key Responsibilities and Success Factors</th>
<th>Assumes <strong>additional responsibilities</strong> when requested or <strong>assists in extra project work</strong></th>
<th><strong>Reliably</strong> completes routine assignments in an <strong>accurate</strong> and <strong>timely fashion</strong></th>
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<td><strong>Meets</strong> the University’s <strong>high performance standards</strong></td>
<td><strong>Contributes positively</strong> to the success of the work group and organization</td>
<td><strong>Performance</strong> <strong>consistently meets</strong> the demands placed upon the position</td>
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<td>Requires <strong>minimal supervision</strong> and <strong>complies</strong> with work rules and regulatory requirements</td>
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<td>Performance <strong>consistently exceeds</strong> Performance Goals, Key Responsibilities and Success Factors</td>
<td>Assumes <strong>extra responsibilities</strong> and participates in projects often</td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td></td>
</tr>
<tr>
<td><strong>Sets and meets</strong> challenging professional goals and <strong>shows initiative</strong> in meeting them</td>
<td><strong>Proactive</strong> in planning, problem solving and initiating solutions within work group</td>
<td></td>
</tr>
<tr>
<td>An <strong>exceptional contributor</strong> to the success of the work group and organization</td>
<td></td>
<td></td>
</tr>
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</table>
## Outstanding

<table>
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<tr>
<th>Is a <strong>role model</strong> in the job</th>
<th>Seeks new and improved ways to perform the job</th>
<th>Is regarded by others as a knowledgeable resource</th>
</tr>
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<tbody>
<tr>
<td><strong>Exhibits mastery</strong> in all facets of a job</td>
<td>Puts the <strong>customer</strong> at the center 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>Is <strong>sought out by colleagues</strong> for advice on issues</td>
<td><strong>Openly shares</strong> information and resources</td>
</tr>
<tr>
<td><strong>Models the values</strong> of the University on a daily basis</td>
<td><strong>Identifies breakthrough concepts</strong></td>
<td><strong>Actively promotes cooperation, understanding and teambuilding</strong></td>
</tr>
<tr>
<td>Is <strong>in sync</strong> with the strategic direction of the University</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Performance</td>
<td>Does not consistently complete job assignments in some areas in an accurate and timely fashion</td>
<td></td>
</tr>
<tr>
<td>------------</td>
<td>-------------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td><strong>meets some but not all performance goals, key responsibilities or Success Factors</strong></td>
<td>Performance or behavior causes occasional problems for students, customers, department/unit and/or co-workers</td>
<td></td>
</tr>
<tr>
<td>Performance requires occasional supervisory intervention</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unacceptable</td>
<td></td>
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| **Overall performance does not meet**  
**performance goals, key responsibilities or**  
**Success Factors**  |
| **Does not consistently complete job**  
**assignments in an accurate and timely**  
**fashion** |
| **Often requires supervision, redirection**  
**and/or re-instruction**  |
| **Performance or behavior often causes**  
**problems for students, customers,**  
**department/unit and/or co-workers** |
The Performance Appraisal Conversation
Preparing for the Conversation

• What questions do we anticipate our employees to ask us as managers?

• What do you think will be their concerns?

• How can we prepare for these conversations now?
Preparing for the Conversation

• Engage in conversation
• Send to employees prior to the appraisal

What do you think is your most important achievement this year?

What is the most difficult part of your job?

What parts of your job are most interesting to you?

What can I do to help you improve your performance this year?

What type of training or development experience would you like to have this year?

What projects, tasks, or activities would you like to focus on this year?
Preparing for the Conversation

- Schedule the meeting in a quiet, private location

- Schedule during a time where you will not be interrupted

- Provide a copy of the appraisal to the employee ahead of time

- Try not to reschedule or push back the meeting
Conducting the Conversation

- Encourage discussion
- Focus on behaviors
- Give objective and specific examples
- Actively listen
- Be open to what the employee has to say
- Create a positive environment
- Build on the employee’s strengths
- Keep the meeting on track
- Follow up
Managing

- Gives directions and instructions
- Solves problems
- Determines best solution
- In charge
- Expects direct reports to follow directions

Coaching

- Asks questions
- Supports coachees in solving their own problems
- Helps coachees evaluate all options
- Collaborates in an equal partnership with coachees
- Expects coachees to make their own decisions
Conducting a Coaching Session

Ask questions:
- that gather information
- that test understanding
- that motivate

Brainstorm options:
- Let the coachee take charge

Discuss the plan
Wrapping Up the Coaching Session

- Gain commitment to action from the coachee
- Identify possible obstacles
- Develop an action plan
- Discuss what support will be given
Setting Goals and Development Plans

myPerformance
Setting Performance Goals

• Performance goals are the results of the activities one performs in his/her job

• Goals should be discussed at the time of the appraisal and finalized when it makes sense for your department
Setting Performance Goals

**Specific**
- Emphasize action/results
- Use specific action verbs

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

**Attainable**
- Consider resources available
- Helps you prioritize

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

**Time-bound**
- Includes start and end points
- Timelines need to be measurable
Creating a Plan: Step by Step

- Knowledge, skill, or competency to develop
- Measures to be used
- Resources required
- Completion date