



Understanding the Performance Management Process



Objectives

- Understanding performance management
- Understanding why we conduct performance reviews
- Understanding the phases of the PMP
- Setting performance goals and standards
- Coaching team members
- Avoiding common review errors



What is Performance Management?

- An ongoing process for communicating about performance and helping people achieve excellence in their roles
- Involves goal setting, feedback, coaching, evaluation, and development planning



Goals of PMP

- Having clearly defined objectives
- Knowing how performance is measured
- Aligning work contribution with institution's success
- Providing ongoing feedback, coaching, and support
- Evaluating and documenting
- Recognizing and rewarding based on performance



Benefits of the PMP

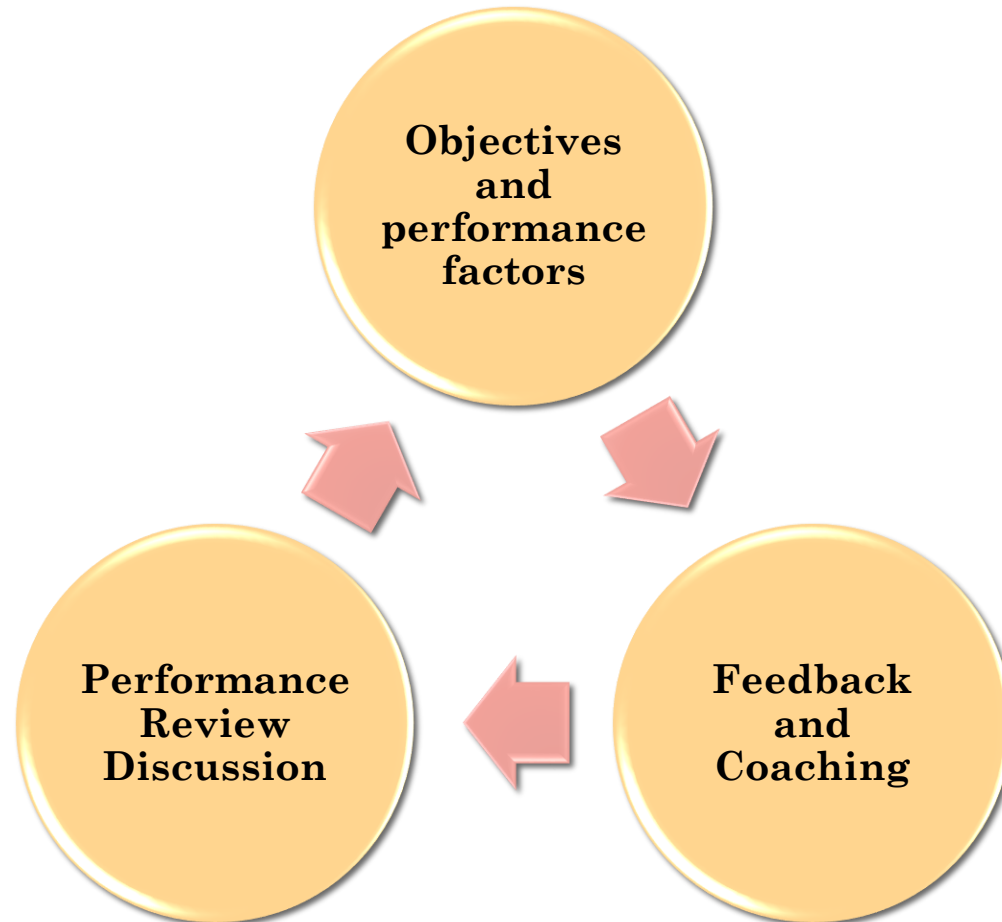
- Allows employees to understand their work contributions
- Allows employees a clear guide on how their performance will be measured
- Establishes clear performance goals and standards
- Provides support and documentation
- Sets the foundation for ongoing communication and support





How PMP Works

The PMP Process



Phase One: Planning

- Establishing objectives and performance factors
- Takes place during May, June, and July months
- Reviewing the current job description prior to meeting
- Making changes if needed
- Defining goals, objectives and expectations for the year



Establish Objectives and Performance Factors

Criteria for writing objectives:

- Clear
- Specific
- Measureable
- Significant
- Challenging



Phase Two: The Midyear Review

- Takes place in between October and November
- Meet mid-way through the performance review period to give formal feedback
 - Assess performance against objectives
 - Provide positive feedback – in writing (if appropriate)
 - Provide constructive feedback (where appropriate)
 - Allow employees access to training venues
 - Coach the employee



Feedback and Coaching

- Providing direction, training, and corrective action
- Documenting throughout the year
 - Supervisor notes
 - Status reports
 - Operational records
 - Work samples
- Coaching
- Giving feedback



Phase Three: The Annual Review

- Takes place in April
- Looks at the entire review period
 - Summarizes past performance
 - Discuss ways of improving future performance
 - Look for opportunities for professional development





The PMP Document

The Form: Rating Worksheet

- Record the important weights for all relevant objectives and factors.
- **Use numbers instead of letters:**
 - 3 = High
 - 2 = Medium
 - 1 = Low
- Record the ratings for all relevant objectives and factors.
- **Use these numbers for the corresponding performance levels:**
 - 5 = Outstanding
 - 4 = Above Standards
 - 3 = Meets Standards
 - 2 = Below Standards
 - 1 = Unsatisfactory

Questions?



Appendices

- Appendix A: Behavior/Results for Individual Performance Factors
- Appendix B: Behavior/Results for Manager/Supervisor Performance Factors
- Performance Management Process Form
- Appendix D: Work Planning Form
- Training Guide

