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

- Objectives and performance factors
  - Performance Review Discussion
  - Feedback and Coaching
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