Performance Management and Evaluation
2008 Expectations for Performance Management

• Ensure full participation
• Engage in interactive goal-setting
• Have candid discussions about expectations & performance
• Meet quarterly to discuss goals, progress, priorities, etc.
• Strengthen correlation between performance & merit distribution
How did 2008-09 measure up?

• What went well?

• What needs work?
Highlights for 2009…

- Performance management cycle
- Continued focus on goal-setting process
- Enhanced appraisal form
- Stronger appraisal narratives
- Candid feedback & performance coaching
- Diligence with quarterly follow-up meetings
- Correlation of performance & merit
Performance management is a process of continuous improvement...

It’s an ongoing dialogue, not an annual event.
Performance Management Cycle

- Goal Setting
- Compensation Process
- Formal Year-End Review
- Ongoing Coaching & Feedback
- Quarterly Follow up
- Assessment and Development Process
Enhanced Appraisal Form

a single appraisal form for professional & salaried staff
New Format (similar content)

• Sect. I  Major Responsibilities
• Sect. II Self-appraisal Worksheet
• Sect. III Prior-year Goals/Objectives & Supervisor’s Narrative
• Sect. IV Performance Factors & Ratings
• Sect. V Goal-setting Worksheet
• Sect. VI Overall Rating
• Sect. VII Employee Comments
2009 Form Enhancements…

- One form for staff employees
- Graphic of performance management cycle
- Inclusion of goal-setting process (prior and new goals)
- Expanded rating scale (from 3 to 5 ratings)
- Addition of “overall” rating
Supervisor’s Narrative is Key

- Develop performance file to assist in writing narrative
- Provide detailed & specific performance feedback
- Focus on goals progress & attainment
- Articulate strengths & areas for improvement (provide examples)
Expanded Rating Scale

• Changed from 3 to 5 ratings
• Enables more precise rating
• Supports correlation of performance with merit distribution

Note: “Overall” rating is a combination of the narrative & performance factors
Performance Improvement Plan (PIP)

- Required when overall rating is “unsatisfactory”
- May also be used for “partially meets expectations” ratings
- Labor Relations should be involved in PIP development
Quarterly Follow-up Meetings

- Performance calibration sessions
- Just as important as annual appraisal
- Discuss progress of goals & objectives
- Review changing priorities & resources that may affect goals
- Make adjustments, as needed
- Include meeting notes in performance file
Ongoing Coaching & Feedback

• Become a better listener
• Recognize good performance
• Provide candid & timely feedback
• Be specific & descriptive
• Link behavior to consequence
• No surprises at appraisal time!
The Goal-Setting Process

People with clear, written goals, accomplish far more in a shorter period of time than people without them could ever imagine.  

Brian Tracy
Goal Definitions

• **Goal**: statement of results to be achieved within a specific timeframe

• **Standard**: ongoing performance criteria to be repeatedly met or exceeded

• **Development Goal**: focuses on enhancing employee competencies (knowledge, skills & abilities)

• **Stretch Goal**: extremely ambitious goal that prompts “outside-the-box” thinking
Variety is good! Consider a combination of goals that:

- Support unit objectives
- Encourage personal/professional development
- Are rigorous - challenge talents & abilities
Create S.M.A.R.T.* Goals

• **Specific** – precise & detailed
• **Measurable** – with criteria for determining progress & success
• **Achievable** – attainable & action-oriented
• **Realistic** – relevant & aligned
• **Time-related** – grounded within a time-frame

*Peter Drucker, The Practice of Management
Tips for Better Goal-setting

• Use “S.M.A.R.T.” guidelines
• Most effective when interactive
• Goal agreement → goal commitment
• Identify resources to accomplish goal
• Communicate unit goals → goal alignment
Goal Alignment

- UD Strategic Plan
- College/Division Goals
- Unit/Department Goals
- Employee Goals
Questions & Comments?

• Appraisals due in Human Resources by Thursday, April 30\textsuperscript{th}

• For assistance with performance appraisal questions & issues, please contact Human Resources at 831-2171 or e-mail employeetraining@udel.edu