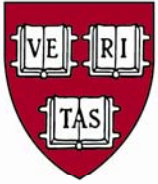




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ePerformance Overview

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Talent Management: A Strategic Priority at Harvard

- A survey of our peer institutions shows that talent management is becoming a high priority among Universities
- Developing and retaining top talent has been highlighted as a risk in a recent Central Administration risk assessment
- The 2011 engagement pulse survey results revealed that career planning/talent management is a top engagement driver for employees

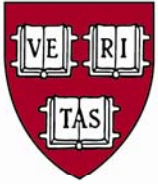


University Framework and Objectives

- Talent Management – an integrated approach



- Performance Management is a critical step in the Talent Management strategy. It is the foundation on which other products are based (succession planning, job descriptions, etc).



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ePerformance at Harvard

Schools and units agreed on common components for a University wide performance management system:

- Organizational and individual goal setting
- Development Plan
- Competencies
- Self assessment by the staff member
- Manager assessment of the staff member
- Interim discussion (mid year check-in)
- Confidential review and completion tracking by Human Resources
- Use of a common rating system which differentiates performance levels



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What is ePerformance?

- Streamlines the performance management process into one Harvard-wide, web-based solution, creating a common employment experience across the University
- Fully integrates with core employee data and the talent management suite in PeopleSoft (learning and development, career planning, and succession planning)
- Allows all Harvard employees and managers to develop, review, and assess employee goals and competencies required for their roles
- Allows all employees and managers to align their personal goals to University-wide and School initiatives



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Work to date and Timeline

- Sept 2012 - Funding approved for ePerformance planning phase
- Sept 2012 – May 2013 - University-wide steering committee and Core planning team was established; weekly design and requirements meetings held
- Feb 2013 - Funding requested for implementation
- June – Aug 2013 – Finalize requirements, begin implementation, initiate change management
- Aug - Sept 2013 – Communication and Training
- Sept/Oct 2013 – Go-live (Phase I - goal setting)



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ePerformance at Campus Services What's the same?

Similarities to CS process

Annual work goals are established for employees

Employees are assessed using competencies

Development Plan included in annual review

Feedback obtained from others: Optional going forward

Use of 5 point performance review rating scale

Ability for employees to complete a self-evaluation during the PMP process

Annual timetable is similar



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ePerformance at Campus Services What's changing and improving?

Changes/ Enhancements - Overall

Increased efficiency/consistency – use of one tool to complete all assessments

Manager's Dashboard – contains job/salary/performance information on direct reports

Changes/ Enhancements – Manager Dashboard

- The Manager Dashboard enables managers to quickly and easily view human resource information for their direct reports on-line

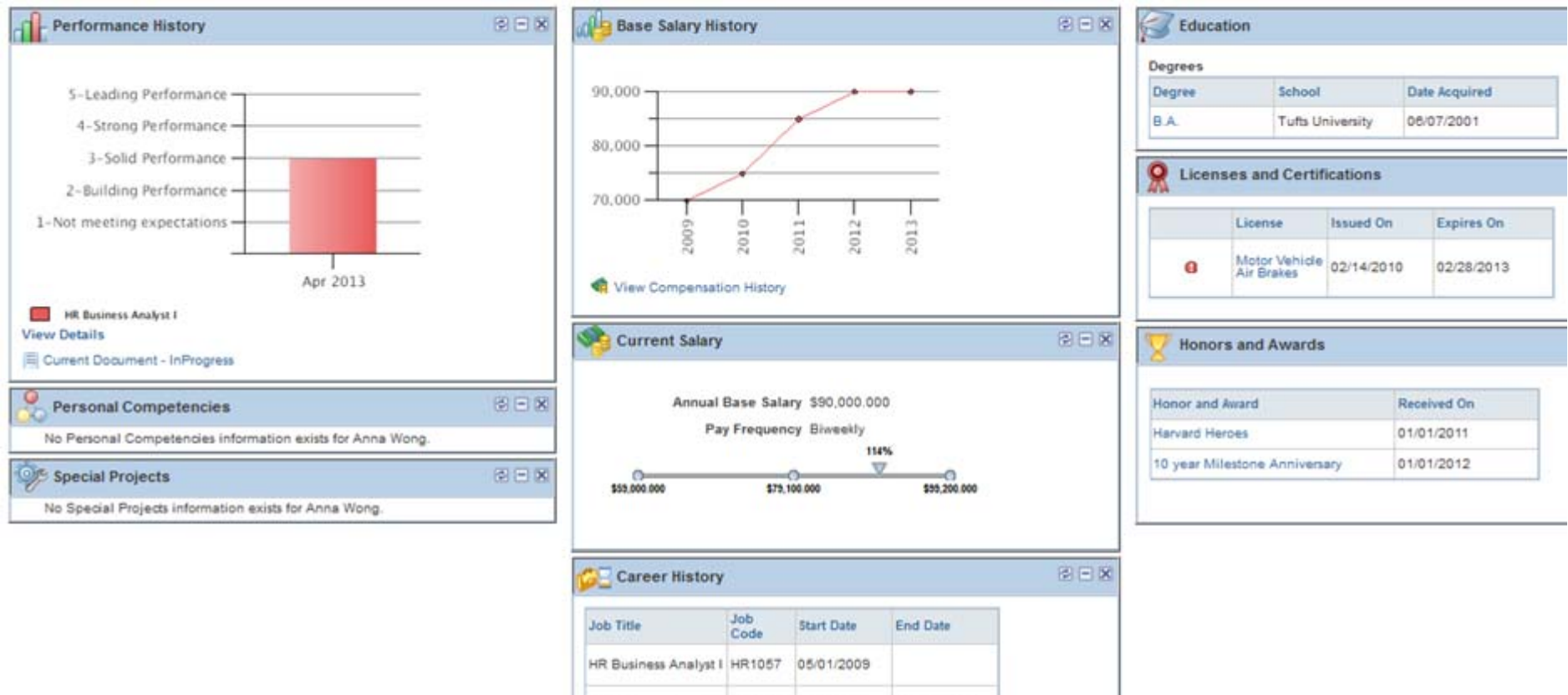


ePerformance at Campus Services

What's changing and improving? (continued)

Changes/ Enhancements – Talent Summary

- Managers will be able to view their direct reports' talent summary information similar to what is displayed below





Competencies and Ratings

Annual Review

Overall rating

- 5- Leading Performance
- 4- Strong Performance
- 3- Solid Performance
- 2- Building Performance
- 1- Not meeting expectations

Rating scale for Competencies:

- 4- Advanced
- 3- Proficient
- 2- Developing
- 1- Does Not Demonstrate

Rating scale for Goals:

- Met
- Partially Met
- Not Met
- N/A

One Harvard Competency Dictionary:

- 31 competencies in the Dictionary
- Schools can select a *sub-set* and make them mandatory for their own employees
- Employees and Managers will pick additional competencies from the list of 31 competencies

University-wide Mandatory Competencies for Managers:

- Teamwork and Collaboration
- Embraces Change
- Resource Allocation
- Building a High Performing Team

University-wide Mandatory competencies for Employees:

- Teamwork and Collaboration
- Initiates Change



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New Performance Ratings and Descriptions

Performance Rating	Definition
5- Leading Performance	Contributions have tremendous and consistently positive impact and value to the department and/or the organization. May be unique, often one-time achievements that measurably improve progress towards organizational goals. Easily recognized as a top performer compared to peers. Viewed as an excellent resource for providing training, guidance, and support to others. Demonstrates high level capabilities and proactively takes on higher levels of responsibility.
4- Strong Performance	Consistently demonstrates high level of performance. Consistently works toward overall objectives of the department and/or organization. Viewed as a role model in position. Demonstrates high levels of effort, effectiveness and judgment with limited or no supervision.
3- Solid Performance	Consistently demonstrates effective performance. Performance is reflective of a fully qualified and experienced individual in this position. Viewed as someone who gets the job done and effectively prioritizes work. Contributes to the overall objectives of the department and/or the organization. Achieves valuable accomplishments in several critical areas of the job.
2- Building Performance	Working towards gaining proficiency. Demonstrates satisfactory performance inconsistently. Achieves some but not all goals and is acquiring necessary knowledge and skills. <u>For new employees:</u> this rating can be used when an employee is still coming up to speed with their job duties as appropriate, based on their tenure in the position.
1- Not meeting expectations	The quality of performance is inadequate and shows little or no improvement. Knowledge, skills and abilities have not been demonstrated at appropriate levels.



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New Competency Ratings and Descriptions (for use by managers only)

Rating	Definition
4- Advanced	Has broad and deep understanding and skills, with substantial expertise and experience in this area. Can apply this competency regularly and independently and display this competency in complex, varied situations. Role model for this competency.
3- Proficient	Has sufficient understanding and experience to operate at a full professional level with this competency, and some practical application and experience. Exercises the skills in a broad range of moderately complex situations. Can generalize basic principles to effectively function in both predictable and new situations.
2- Developing	Newly developing in this area; has a general understanding of key principles but limited or no applied experience with this competency. Is capable of using this competency with coaching and support, in simple situations.
1- Does Not Demonstrate	Does not demonstrate this competency at the expected level, even with available assistance or direction from others.



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New 360° Process and Questions

- With ePerformance, 360° feedback questions are part of the annual review form; employees and managers can select assessors.
- 360° questions are completed by:
 - *Other Reviewers* (peers/co-workers/internal Harvard colleagues)
 - *Direct/Indirect Reports* (for employees that supervise at least one employee).
- 360° results are not shared directly with the employee. Results are viewed by the manager to help inform the overall performance summary and rating.
- Example of open-ended questions for *Other Reviewers*:
 - What does this employee do well?
 - What should this employee start doing?
 - What should this employee stop doing?
- Managers have the ability to include additional open-ended 360° questions for *Other Reviewers*.



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New 360° Process - Direct Report Questions

- Narrative and rated 360° questions will be included for *Direct/Indirect Reports* in the annual review form. The questions are currently being vetted by HR Deans and Directors.
- Proposed topics for rated questions include:
 - Communication
 - Accountability & Development
 - Workplace Environment & Teamwork
- Proposed narrative questions include:
 - What are your manager's strengths in managing?
 - What are areas for improvement in his/her management style?
 - Additional comments or specific examples of your manager's effectiveness.



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Training Delivery Methods (offered by CWD)

Quick Tours

Online Help

(in PeopleSoft)

Eureka

Web-Ex

-Online Courses

"Ask the Trainer"

-Job Aids

Instructor-Led

Campus Services Presentations

-Labs

-local training delivery



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ePerformance Transition – First Year

- Aug/Sep 2013 – Communication and Training
- Oct 2013 – CS goals are transferred to ePerformance
 - Goals established in the June 2013 annual performance review will be entered into PeopleSoft by employees
 - Managers review and approve goals in PeopleSoft
- Jan 2014 – mid-year check-in
- April 2014 – 360° assessors selected
- May 2014 – 360° assessments completed
- May 2014 – self-evaluation completed
- June 2014 – annual performance review completed
- June/July 2014 – set goals for coming year