

Performance Management Process Overview for Staff Members

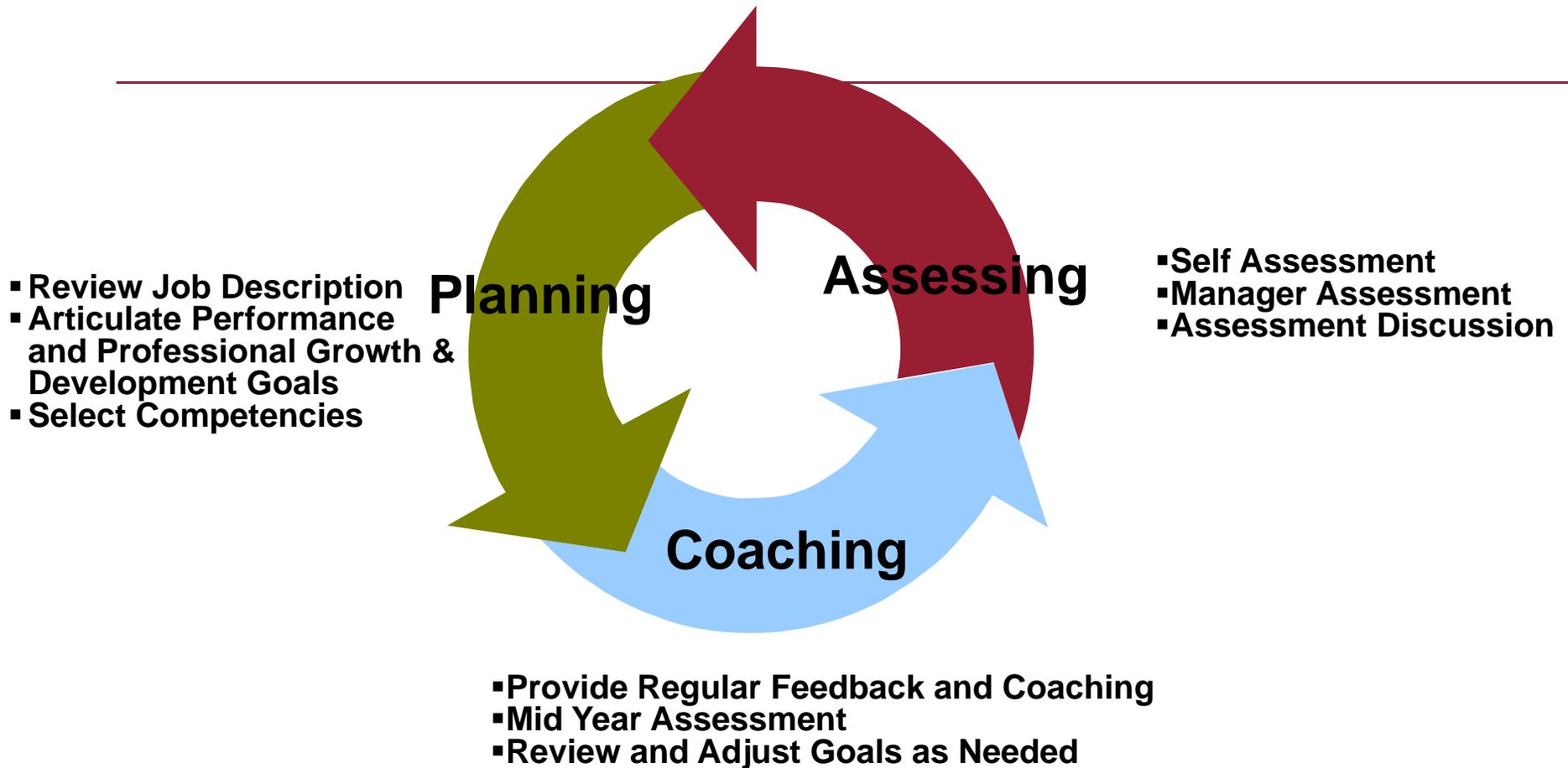
A word cloud of performance management terms. The words are arranged in various orientations and sizes. The most prominent words are 'Goal Planning' and 'SMART'. Other visible words include 'Competencies', 'Performance', 'Deliverables', 'Metrics', 'Outcome', 'Professional-Development', 'Process', 'Alignment', and 'Deadlines'. The colors range from light grey to dark red.

Competencies
Performance
Deliverables
Metrics
Outcome
SMART
Goal Planning
Professional-Development
Process
Alignment
Deadlines

Agenda

- Overview of Performance Management Process
- Planning and Goal Setting Overview and Key Tips
- Q&A

Managing Performance: An Ongoing Process



Performance management is a collaborative process between the staff member and the Manager. It continues throughout the year, although there are fixed times when formal conversations occur.

Performance Management Cycle

Harvard Fiscal Year (July 1 to June 30)

July
Planning &
Goal Setting

July	August	September
October	November	December

December
Interim
Reviews

May
Self
Assessment

January	February	March
April	May	June

May & June
Conversations
& Mgr
Completed
Assessment

June 30
Completed
PDP Forms
Submitted HR
Office

Planning: Job Description

Managers are accountable for keeping job descriptions current:

- Manager discussed with staff members
- Reflect department mission & needs
- Review and update if necessary
- Track position changes over time

Performance Planning/Goal Setting

Goal=**What** is to be achieved

- **Illustrate** clearly how the work of an individual aligns with and contributes to the achievement of department goals
- **Manager** and **Staff Member** Agree on Goals
- **Dynamic** in nature, adjustable, iterative
- **Managers** coach, give and receive feedback, and assess staff performance against the goals on an ongoing basis throughout the year
- **Staff Members** track their accomplishments, ask for feedback and assistance, and self-assess against the goals

Writing Goals-“SMART” Principles

S – Specific/Stretch

M – Measurable/Metric

A – Aligned

R – Realistic

T – Timeframe

Performance Goal: Staff Assistant

- **Goal:** Manages office orders and equipment, including computer software, hardware, printers, phones, copiers, faxes, AV equipment; ensure efficient reliable office operations. Maintain and repair equipment.
- **Metrics:** Supplies are available; equipment is in working order. All issues are tracked and resolved in a timely manner.
- **Competencies:** Technical skills, follow-through, planning and organization.

Performance Goal: Custodial Manager

Goal: Make sure buildings are clean. Maintain strong relationships with clients.

- **Metrics:** Results of audit records; customer feedback.
- **Competencies:** Customer Focus, Building Relationships

Goal: Comply with all safety and compliance training.
Ensure MSDS in local areas are up to date.

- **Metrics:** Training records are complete and compliant
MSDS Audit.
- **Competencies:** Safety Awareness, Managing Work

Performance Factors/Competencies

- **For all Staff Members in Campus Services:**
 - **Customer Focus**
 - **Accountability**
 - **Communication**
 - **Building Positive Working Relationships**
- **For Managers:**
 - **Develops Others**

Competencies=How work gets done, how assignments are being completed, so that goals are achieved.

Planning: Professional Growth & Development Goals

- Articulate development needs
- Focus on current and near-future position and department needs
- Sustain/enhance individual strengths
- Use “SMART” principles when writing professional growth & development goals

How Development Occurs

Experience Based Learning	Relationship Based Learning	Education Based Learning
Projects/ Assignments	Bosses	Courses
Jobs	Colleagues	Seminars/ Conferences
Hardships	Mentors	Training Programs
Community Service	Coaches	e/Distance Learning

Questions & Answers



Campus Services PMP Form:

Part I – Goal Setting

 Central Administration/Campus Services 2013-2014 Performance Management Process				
Employee Name:		Current Job Title:		
Department:		Manager Name:		
Salary Grade:				
Part I Performance Planning/ Goal Setting				
Goals / Deliverables	Metrics	Performance Factors/Competencies Skills and behaviors needed to achieve goal	Timeframe	Outcome <i>Employee/Manager complete at Year End Assessment phase</i>
				Employee: Manager:
				Employee: Manager:
				Employee: Manager:
For Managers: Effectively manage and support direct reports throughout the year. Including, but not limited to open two-way communication, coaching, commitment to PMP process, ongoing feedback, etc.	<ul style="list-style-type: none"> Timely completion of all phases of PMP process including ongoing 1:1 discussions Feedback (upward feedback, direct supervisor, etc.) 	<ul style="list-style-type: none"> Develops Others Communication skills 		Employee: Manager:
OPTIONAL - Unit's Competencies or Performance Factors – Unit specific common performance factor/competency may be included, if applicable.				
Unit's Performance Factor/ Competency			Outcome	
Customer Focus: Making customers and their needs a primary focus of one's actions; developing and sustaining productive customer relationships. Seeks to understand customers; actively seeks information to understand customers' circumstances, problems, expectations, and needs. Shares information with customers to build their understanding of issues and capabilities. Builds rapport and cooperative relationships with customers. Takes action to meet customer needs and concerns.			Employee: Manager:	

Thank you!

Please contact us with any questions.

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Central Administration is strongly committed to the professional development and continuous improvement of all of its members through effective and proactive career development and performance development efforts.

Planning

Coaching

Assessing

Job Description – Review and Update

Goals

- Roadmap to success “What is/needs to be achieved?”; dynamic in nature, not static
- What staff member is to achieve (results)
- Align with unit mission
- “SMART” Goal Principles
- S – Specific/Stretch: Clearly define work to be completed
- M – Measurable: Define how success will be measured, i.e., client feedback, financial measures
- A – Aligned: “Fits” with unit mission/purpose
- R – Realistic: Achievable with current human and financial resources
- T – Timebound: Completed by, i.e., January 15, 2012; as indicated in the project plan.
- Professional Growth and Career Development Activities Examples
- Working with someone with the skill
- On-the-job or on-line training, Job shadowing
- Attending a conference
- Cross team projects
- Reading/studying/research

Competencies

- *Staff:*
- Customer Focus
- Contributes to Team Success
- Building Rapport and Relationships
- Valuing Diversity
- *Managers:*
- Develops Others
- Strategic Thinking and Decision Making
- Ability to Influence

Coaching is...using open ended questions (Managers)

Sample Questions

- What did you do well?
- What would you do differently the next time?
- What was your greatest success with the project?
- What were the most difficult problems? How did you overcome them?
- How can I support you as your manager?

Feedback is... “telling” (Managers and Staff)

Giving

- Use Behavior + Impact (+Alternative Positive Behavior) Formula
- Direct feedback toward behavior that can be changed
- Avoid extreme characterizations, e.g., you always
- Consistent and Timely
- Suggest alternatives and “why” they may work
- Allow individual time to respond

Receiving

- Be proactive; ask for feedback
- Assess your own performance
- Recognize your emotions and responses
- Absorb and reframe the feedback to see advantages
- Take action towards change

Track progress via an electronic file and/or paper file.



Key Principles

- Builds on conversations to date
- Specific and behaviorally focused
- Representative of entire performance period
- Reflects progress against existing goals
- Contributes to development

Resources to Gather Information

- Job description
- Staff member’s self assessment
- Goals/competencies for FY08
- Notes from conversations/meetings throughout the year, schedules, committee meetings, etc.
- Gather feedback from external and internal clients, as appropriate
- Identify any events or other changes that may have impacted ability to achieve goals and use competencies

Writing

- Telling a story from your perspective as a staff member (self assessment) or manager, that includes:
 - What went well and why (Use Behavior + Impact (+Alternative Positive Behavior))
 - What didn’t go as expected and why
 - Alternatives on how to handle issues in the future
 - Ratings

Discussion

- Staff member and manager discuss performance and cite specific examples
- Both actively listen
- Overall assessment including rating
- How you and your manager can help each other succeed