Today’s goals

- The value of effective performance management
- 3 components of performance management
- Whitman’s new performance management model
- Timeline of performance management process
- Using BambooHR for performance management
Performance Management is a PROCESS, that:

• Involves communication between a supervisor and an employee
• Is ongoing
• Ensures the work we do is in support of accomplishing the goals of our department
• Helps employees fulfill their potential
The dreaded annual performance review

• It takes time & effort.
• They are often overly complicated.
• “Formal” feedback can be scary and anxiety-producing.
• It is frequently out of context because of lag time.
Annual reviews are losing relevance

• Fewer organizations are using annual reviews:
  • 2016: 82%
  • 2017: 65%
  • 2018: 58%
  • 2019: 54%

• Effective feedback is:
  • timely,
  • frequent, and
  • a continuous process
  • that engages employees.
Good performance management adds tremendous value

• Helps satisfy our desire as employees to grow and develop.

• Improves communication between employee & supervisor.

• Aligns our work with our department and institution.
3 components of effective performance management

1. Ensuring departmental core values & priorities drive our work

2. Assessing performance
   • Performance assessment
   • Feedback from others
   • Ongoing conversations between supervisors and employees

3. Goal setting
Assessing performance

(1) ASSESSMENTS
  • Employee self-assessment
  • Supervisor assessment

(2) FEEDBACK FROM OTHERS
What should assessments measure?

**PERFORMANCE**
• Measures where someone has been and where they currently are.

**ENGAGEMENT**
• Understanding engagement helps make sense of the future.
Feedback

Feedback from others

• Feedback from others creates the opportunity to put together the whole picture.

• It is important for feedback to be given anonymously and for supervisors to protect anonymity.

Performance conversation

• One-on-one conversations between employee and supervisor to talk about assessments

• Entering the conversation in right frame of mind & being prepared

• Assessments & feedback drive goals setting
Setting goals

• Goals should be established collectively.

• Make sure goals align with core values, priorities, and areas that need improvement in performance and/or engagement.

• Find ways for goals to leverage your strengths & talents.

• Document your goals and regularly revisit in one-on-one meetings with your supervisor.
Setting goals

Make sure goals are SMART:
- Specific
- Measurable
- Attainable
- Relevant
- Time bound
Whitman’s new performance management model

1. Assessment
   - Self-assessment
   - Supervisor assessment
2. Performance review conversation
3. Feedback invitation
   - Feedback from 1-10 others (make sure to include employees of supervisors)
4. Goal-setting
5. Ongoing one-on-one conversations to share peer feedback & monitor performance, engagement, and goal progress.
6. Repeat (every 4 months).
Timeline

• Apr. 1: Assessments go live in BambooHR
• Apr. 1 – Apr. 30: BambooHR sends email reminders
• May 1: Assessments close
• Month of May: Performance review conversations
• Mid May – mid June: Others provide feedback
• July: HR invites your feedback about the process
• Aug. 1: The process begins again!
Self-assessment
Hi Jenn,

Charlotte Abbott completed the Self Assessment. You must first complete your assessment of Charlotte before you see Charlotte's Self Assessment.

Why, you may ask? Well, having employees and managers complete their part of the Assessment prior to revealing them facilitates more meaningful dialog. It creates the opportunity to have a worthwhile discussion around performance rather than simply reacting to the Self Assessment.
Supervisor assessment
Hi Charlotte,

Please take a few minutes to provide feedback about Daniel Vance. Share your insights into what Daniel does well and help identify opportunities for improvement.

⏰ The deadline for submitting this feedback is Feb 8.

Daniel will not see your feedback.

Give Feedback
Feedback from others
Goal setting

Performance

Goals Feedback Assessment

New Goal

Increase retention by 5% before the end of Q1
Aligns with review performance results and share with the C-Suite.
Research trends in terminations and deep dive into ways we can improve.

Olivia Sterling
Jan 21, 2020 at 10:05 AM
Can you please give me an update on this by the end of January?

Add Comment
Goal setting

Add a New Goal

Your New Goal

mm/dd/yyyy *

Short description of what you will accomplish and how.

-Goal Alignment- (Optional)

Save Cancel
Goal setting

**Share this goal**

**Who has access**
- Charlotte Abbott
- Ashley Adams

**Add People**
- Tony Fonseca
Goal setting

Performance

Goals: Increase retention by 5% before the end of Q1

Aligns with: Review Performance results and share with the C-Suite
Research trends in terminations and deep dive into ways we can improve.

Status: In Progress

Add Comment

Olivia Sterling
Jan 23, 2020 at 10:25 AM
Can you please give me an update on this by the end of January?
Helpful resource

Completing the self-assessment:

https://www.whitman.edu/human-resources/hiring-managers-and-supervisors/performance-appraisals