

Performance Management at CU

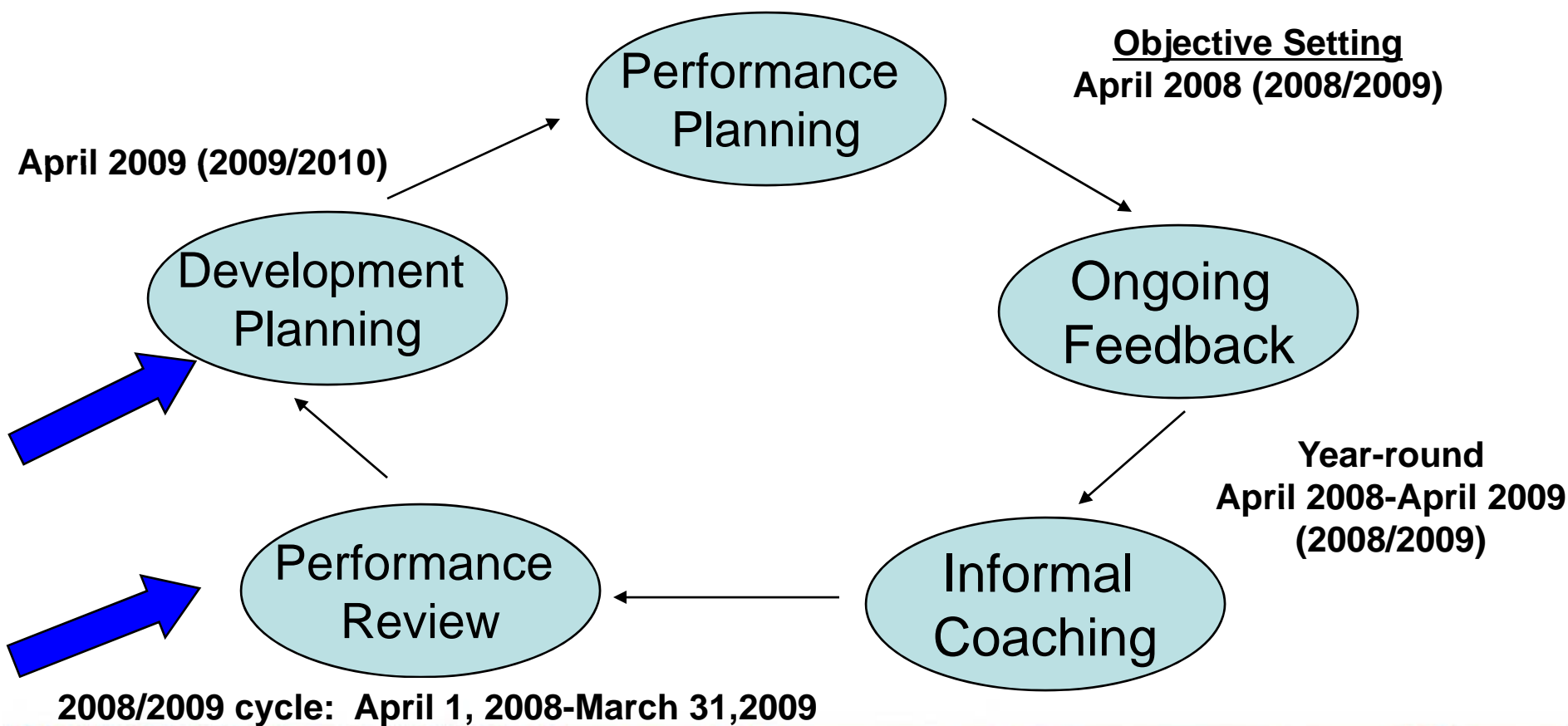
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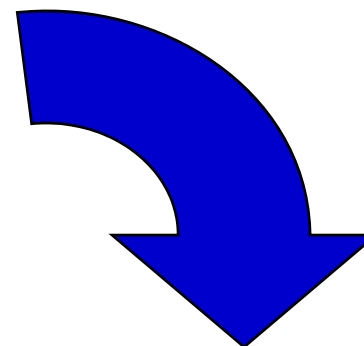
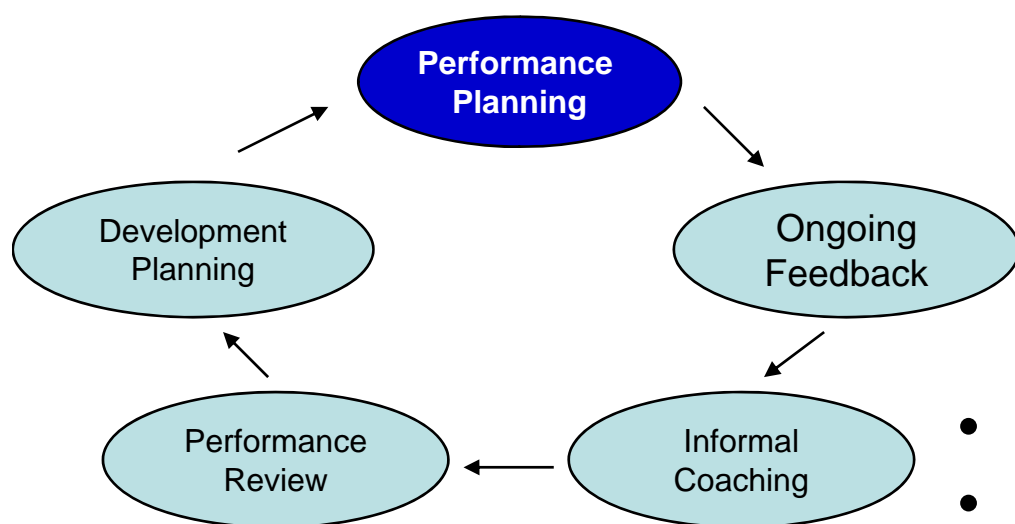
The Performance Planning Cycle

April 1, 2008 – March 31, 2009

FY 2008/2009



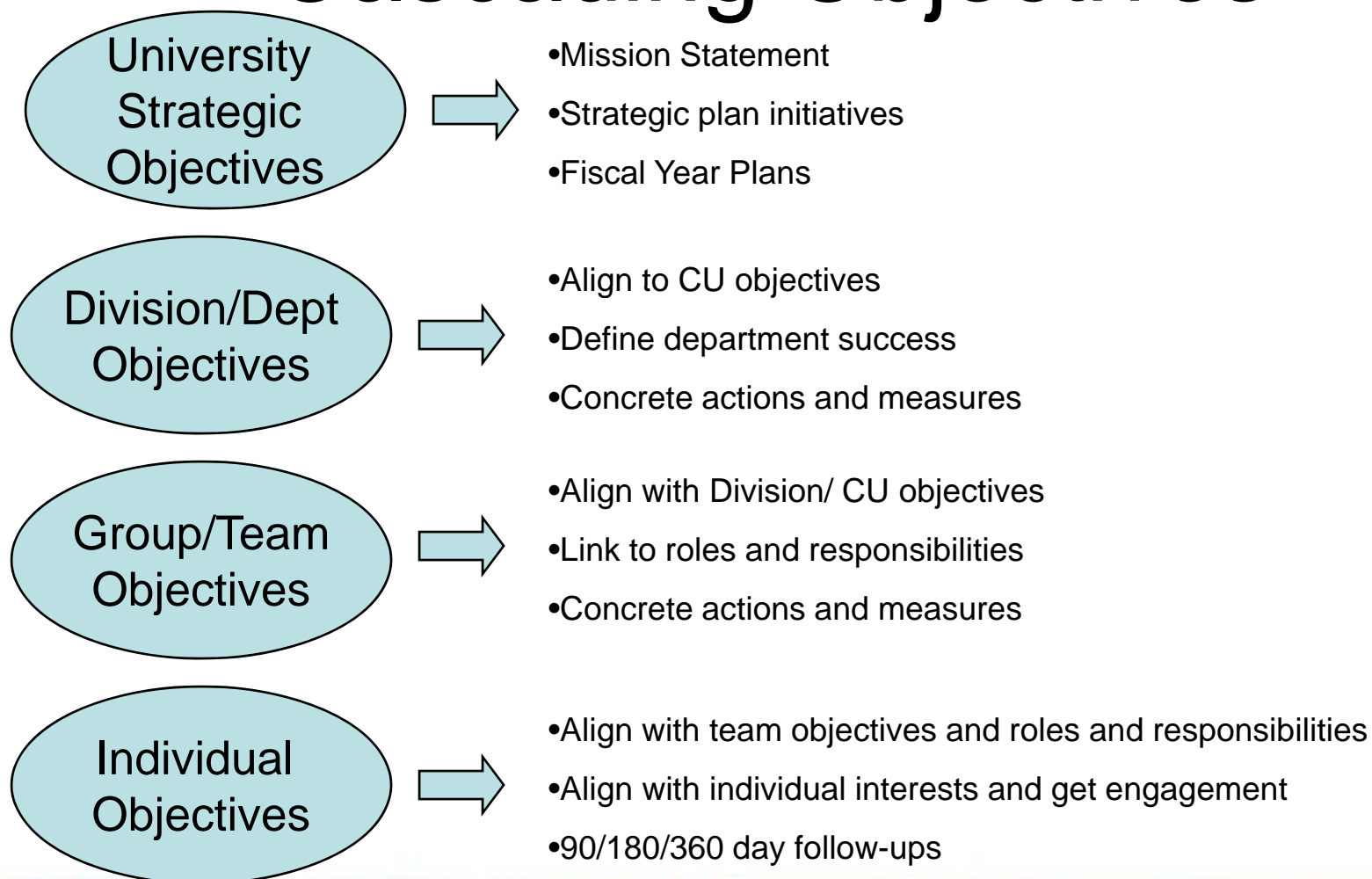
Performance Planning



- Explain Process to Employee
- Set SMART Objectives
 - What are CU's objectives?
 - What are the division/department objectives?
 - What role does each person play in achieving those objectives?



Cascading Objectives

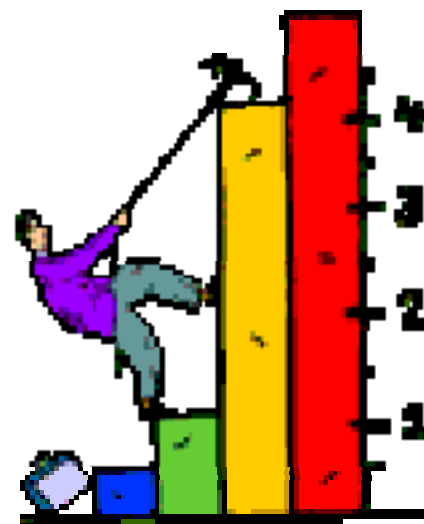


Example Objective



SMART Objectives

- Set (**SMART**) objectives
 - **S**pecific
 - **M**easurable
 - **A**ttainable
 - **R**elevant
 - **T**ime bound

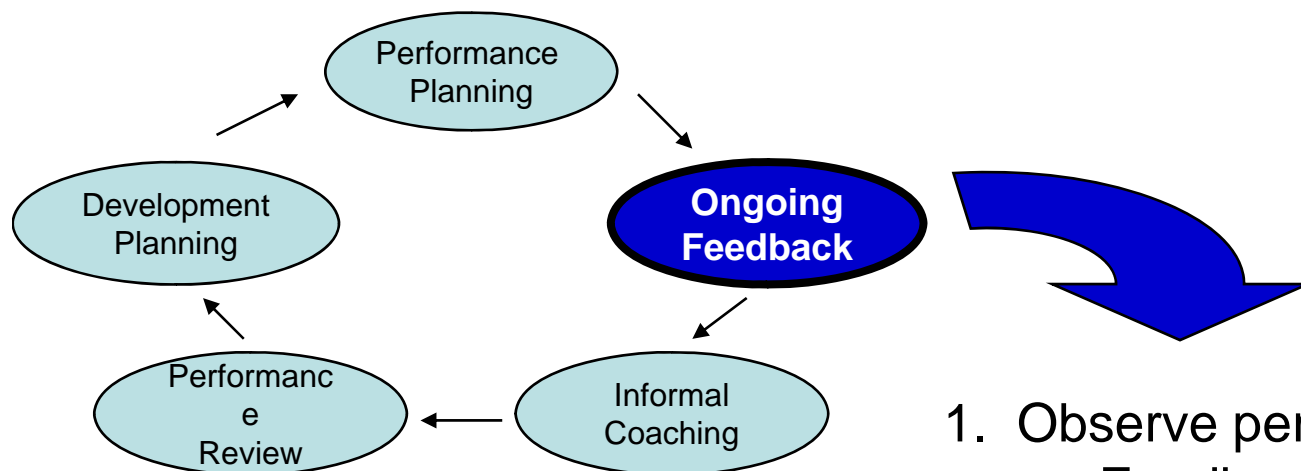


Exercise

- Write one department objective and one individual objective using the sample topics on your table.



Ongoing Feedback

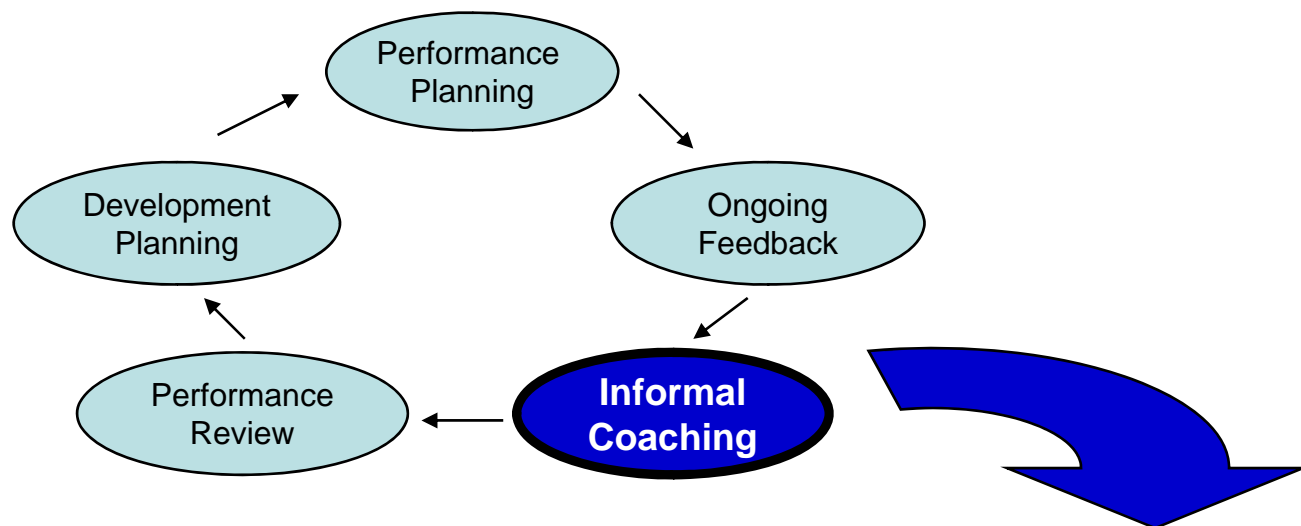


1. Observe performance
 - Feedback, Records/Documents
2. Discuss performance
 - BEST Feedback
3. Record performance
 - Coaching log
 - Copies of reports, memos, Disciplinary action forms, Reports, etc.

*Feedback must be immediate or it loses its impact!



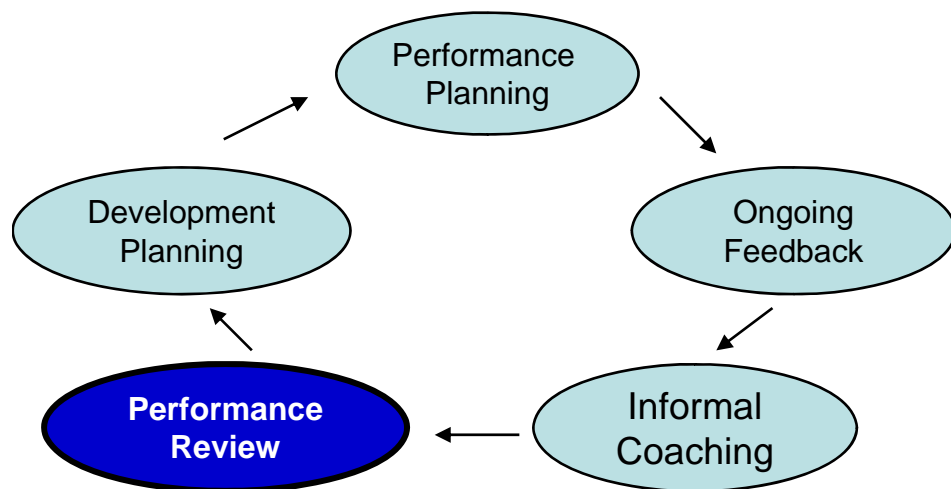
Informal Coaching



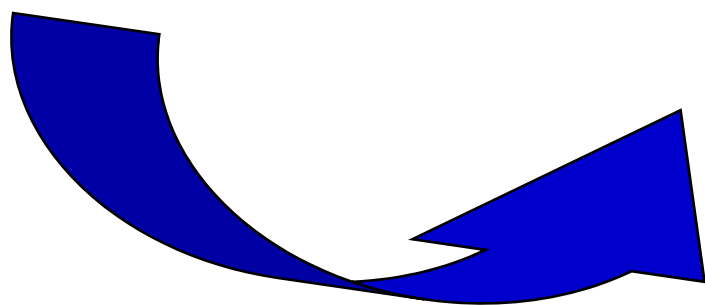
- Is the employee aware?
- Is the employee motivated?
- Do the manager and employee agree on an objective?
- What does manager's level of involvement need to be?



Performance Review



- S: Structure the conversation
- O: Overall evaluation review
- L: Listen and encourage input
- I: Inform...give performance feedback
- D: Develop action plans



How are evaluations used?

- Evaluate Performance
- Training & Development
- Transfer/Promotion
- Support disciplinary action/termination
- Legal issues if the person sues employer – poorly written evaluations can be damaging in this area.



Meets Objectives

Performance regularly meets expectations of established objectives. Employee may exceed some, but not the majority of objectives.

- Performs essential functions of the assigned job or task.
- Reports to work regularly and on time.
- Consistently provides excellent customer service and resolves issues and/or complaints.
- Seeks out developmental opportunities and applies to job.

Examples

- Employee responds to e-mails and phone calls daily and escalates issues as appropriate.
- Employee completes all assigned tasks even if tasks aren't normally their direct responsibility.
- Employee provides excellent customer service to all and treats everyone respectfully.

Note: An overall “Meets” employee may have a couple of competencies in the Needs Improvement or Exceeds category.



Exceeds Objectives

Performance always meets and generally exceeds established objectives.

- Displays exemplary performance and consistently goes above and beyond.
- Regularly volunteers to absorb additional work and assist others.
- Always provides exceptional customer service and proactively resolves issues and/or complaints.
- Seeks out additional developmental opportunities and volunteers to lead projects.
- Works to develop others.
- Is ready to take on additional responsibilities, more complex assignments and/or projects.

Examples

- Employee often initiates improved process changes even if they don't "own" the process currently.
- Employee actively seeks out opportunities to take on more complex assignments and/or projects.
- Employee initiates a new process that provides the university with an enhancement or savings.

Note: An Exceeds employee shouldn't have any major areas of Needs Improvement.



Needs Improvement

Employee needs coaching and is not performing up to standards.

Examples:

- Performs a few or some of the essential functions of the assigned job or task.
- Inconsistently reports to work and is inconsistently on time.
- Not able to effectively respond to or resolve customer/departmental issues.
- Does not seek out developmental opportunities.
- Employee is new to role and isn't yet proficient in certain tasks.

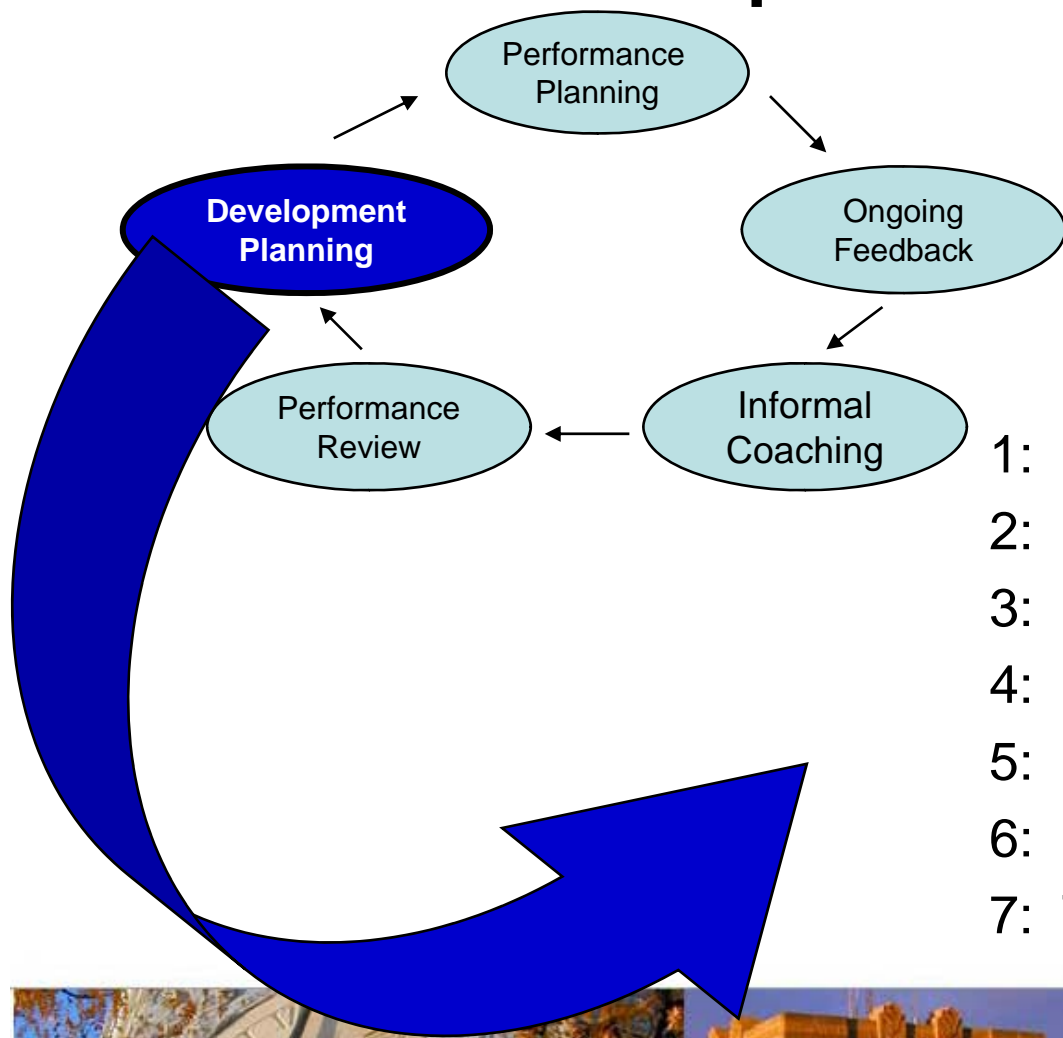
Examples

- Employee lacks professionalism (dresses inappropriately, uses inappropriate language, participates in too much side conversation).
- Employee doesn't respond to e-mails or voice mails in a reasonable time frame and often doesn't respond at all.
- Employee often "forgets" to complete assigned tasks.
- Employee doesn't greet and/or acknowledge customers.
- Employee hasn't responded positively to coaching and/or development activities.

Note: An overall rating of "Needs Improvement" means that the employee isn't meeting most objectives and/or needs improvement in the majority of competency factors.



Development Planning



- 1: Specific
- 2: Limited Focus
- 3: Commitment
- 4: Shape Performance in Small Steps
- 5: On-the-Job
- 6: Support
- 7: Time Frame



FAQ's

Q: When are evaluations due to HR for the 2008/2009 performance period?

- May 1, 2009

Q: What forms need to be submitted to HR?

- The Performance Evaluation Form (Pages 1-4) only.
- HR does not need the Employee Self Assessment or the Development form.

Q: How do we submit the performance evaluations?

- Evaluations must be submitted electronically via e-mail as a Word (.doc) or pdf (.pdf) document ,with one document per person. Please name the document with the employee's name, (last name_first name). E-mail to hr@creighton.edu. Detailed instructions on the submission process can be found on the hr website at: <http://www2.creighton.edu/hr/compensation/performance/index.php>

Q: What approvals are required before submitting the performance evaluations?

- It may vary by division and/or department but typically two levels of manager/administrator/dean approvals are required.
- For example: The direct manager/supervisor and then one level above (Director and/or Administrator and/or Dean)



Questions

