THE NEW PERFORMANCE MANAGEMENT PROCESS
OBJECTIVES

- By the end of the training session, you should be able to:
  - understand what is changing and how it will benefit you;
  - identify important dates of the transition period;
  - describe the new performance management process and online tool;
  - identify the components of the new performance plan
  - list the new performance criteria and corresponding assessments; and
  - become familiarized with the new online tool.
WHAT IS CHANGING?

Five key aspects are changing:

<table>
<thead>
<tr>
<th>Current</th>
<th>New</th>
</tr>
</thead>
<tbody>
<tr>
<td>One-time appraisal</td>
<td>Continuous performance process</td>
</tr>
<tr>
<td>Guidelines Oriented Job Analysis (GOJA)</td>
<td>Performance Planning Online Tool</td>
</tr>
<tr>
<td>Limited performance criteria</td>
<td>Comprehensive performance criteria</td>
</tr>
<tr>
<td>Numeric score</td>
<td>Qualitative assessment</td>
</tr>
<tr>
<td>Merit based on numeric score</td>
<td>Merit based on overall performance criteria</td>
</tr>
</tbody>
</table>

Jan Feb Mar Apr May Jun Jul Aug Sept Oct Nov Dec Jan Feb Mar Apr May

Extended period

End-of-extended cycle formal assessment

Reviews conducted

New process begins June 1, 2016
THE NEW PERFORMANCE MANAGEMENT PROCESS

Performance Planning Tool is used to create SMART goals, set objectives, establish duties and responsibilities.

Performance Planning tool is used to record and monitor progress.

The formal assessment of employee performance for the year based on previously established goals and performance criteria. The Performance Planning tool is used throughout the process, beginning with:
- self-assessment
- manager assessment
- one-on-one meeting
- 2nd level manager review
- employee, manager and 2nd manager acknowledgment
PROVIDE OPEN AND CONSISTENT COMMUNICATION

1. ESTABLISH THE RELATIONSHIP
2. SET EXPECTATIONS
3. EXCHANGE FEEDBACK/COACH
4. INTERVENE DURING A CRISIS
5. REALIZE POTENTIAL
THE NEW PERFORMANCE MANAGEMENT PROCESS

PERFORMANCE PLANNING

MID-CYCLE REVIEW

PERFORMANCE REVIEW

June 1
Establish performance plan
Performance Planning tool is used
### Performance Planning and Evaluation Online Tool

**Employee Name:** [ ]  
**Manager Name:** [ ]  
**Employee Title:** [ ]  
**Manager Title:** [ ]  
**Department:** [ ]  
**Date of Planning:** [ ]

<table>
<thead>
<tr>
<th>Position Specification has been reviewed:</th>
<th>Position Specification is current:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>No</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Employee Segment</th>
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</thead>
<tbody>
<tr>
<td>Unclassified</td>
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</tbody>
</table>

**Directions:** Please indicate specific requirements for each performance criteria below.

<table>
<thead>
<tr>
<th>Performance Criteria: Job Duties, Responsibilities and Standards</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ] Job Duty/Responsibility: Standard</td>
<td></td>
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<td>[ ] Job Duty/Responsibility: Standard</td>
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<tr>
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</tr>
</tbody>
</table>
BUILDING A PLAN: WHAT ARE THE COMPONENTS?

- Duties, Responsibilities and Standards
- Goals and Objectives
- Competencies
- Behaviors
- Professional Development Plans

- Work Environment
- Physical Demands
<table>
<thead>
<tr>
<th>Step</th>
<th>TASKS</th>
<th>DUE</th>
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</thead>
</table>
| **Step One** | • Collaborate with employee on annual SMART goal setting  
               • Log into the system and add employee goals in Goal Management. | JUNE 30 |
| **Step Two** | • After receiving e-mail prompt, log into the system and add employee job duties. | JULY 15 |
| **Step Three** | • Schedule a one-on-one meeting with the employee to review the performance plan.  
                  • After meeting, complete workflow in the system. | JULY 30 |
CASCADING GOALS

Goals should reflect individuals departmental, divisional and University needs.

**Institutional Strategy and Goals**
Vision, Mission, and Strategic Plan
Open and Clear Communication of Institutional Strategic Plan and its Impact on Divisions/Schools/Departments

**Division, School, and Department Strategies and Goals**
Division/School/Department Plans and Objectives in Support of Institution Objectives
Open and Clear Communication of Divisional/Departmental Strategic Plan and its Impact on Teams and Individuals

**Individual and Team Goals**

**Checkpoint:**
During what point of the performance process would you set goals? What tool would you use?
## DEFINING AND SETTING INDIVIDUAL SMART GOALS

<table>
<thead>
<tr>
<th>S</th>
<th><strong>Specific</strong>: Make goals precise and tangible to provide clear direction.</th>
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</thead>
<tbody>
<tr>
<td>M</td>
<td><strong>Measurable</strong>: Measure to manage. Establish concrete criteria for measuring progress toward each goal, such as quantity, quality, and cost.</td>
</tr>
<tr>
<td>A</td>
<td><strong>Achievable</strong>: Choose a goal that is attainable given the current skill level, timeframe, and resources.</td>
</tr>
<tr>
<td>R</td>
<td><strong>Realistic</strong>: Devise a plan that makes the goal reasonable</td>
</tr>
<tr>
<td>T</td>
<td><strong>Time-bound</strong>: State the time for completion.</td>
</tr>
</tbody>
</table>

**Checkpoint:**
During what point of the performance process would you create SMART goals?
What tool would you use?
**EXAMPLE: CASCADING INDIVIDUAL SMART GOAL**

**UNIVERSITY GOAL #5**
Develop and manage human, financial, physical, and technological resources effectively, efficiently, and ethically to support the university's mission.

**FINANCE & SUPPORT SERVICES (FSS) DIVISIONAL GOAL**
Enhance our customer service focus by continuously reviewing our core processes and implementing new services.

**TRANSPORTATION SERVICES DEPARTMENT GOAL**
Transportation Services evaluates the parking permit structure in order to ensure expense coverage by establishing a committee that will make recommendations for adjusting fees and the budget by the end of the first quarter. Recommendations will consider three alternatives.

**INDIVIDUAL SMART GOAL**
Serve as a productive member of the Parking Structure Review Committee by providing informational and analytical support to the committee with final recommendations to be made by March 31st, 2016. Performance will be measured by meeting attendance, active participation and quality of information and analytics provided. Biweekly updates are provided by 4pm on Friday to the Transportation Services Director.

**Checkpoint:**
Are your individual goals SMART?
THE NEW PERFORMANCE MANAGEMENT PROCESS

PERFORMANCE PLANNING

MID-CYCLE REVIEW

PERFORMANCE REVIEW

October - November
Informally meet one-on-one to assess progress on previously established goals
THE NEW PERFORMANCE MANAGEMENT PROCESS

PERFORMANCE PLANNING

MID-CYCLE REVIEW

PERFORMANCE REVIEW

April - May 31
Self-assessments
Manager assessments
Performance reviews conducted
All performance reviews completed
WHAT ARE THE NEW PERFORMANCE CRITERIA?

- Duties, Responsibilities and Standards
- Goals and Objectives
- Competencies
- Behaviors
- Professional Development Plans
HOW ARE THE NEW PERFORMANCE CRITERIA ASSESSED?

Duties, Responsibilities and Standards
- Distinguished
- Valued
- Needs Improvement

Goals and Objectives
- Distinguished
- Valued
- Needs Improvement

Competencies
- Mastery Level
- Advanced Level
- Entry Level

Behaviors
- Frequently
- Sometimes
- Rarely

Professional Development Plans
- Varies per individual and job
THE NEW PERFORMANCE MANAGEMENT PROCESS

The formal assessment of employee performance for the year based on previously established goals and performance criteria.

The Performance Planning tool is used throughout the process, beginning with:
- self-assessment
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JUNE 1

Process of identifying what you want to accomplish and creating a plan on how to achieve your desired results within a specific time frame.

Performance Planning Tool is used to create SMART goals, set objectives, establish duties and responsibilities.

MANAGER

Ongoing Feedback

PERFORMANCE PLANNING

APRIL - MAY 31

PERFORMANCE REVIEW

MID-CYCLE REVIEW

OCTOBER - NOVEMBER

An informal one-on-one meeting between supervisors and employees to assess progress on previously established goals and objectives.

Performance Planning tool is used to record and monitor progress.
NEXT STEPS

- Visit the [www.hr.txstate.edu/performance-management.html](http://www.hr.txstate.edu/performance-management.html) to learn more about the new process and how to use SuccessFactors
- Review and practice the coaching techniques described in the Primer found in the website
- Attend Open Labs and encourage employee(s) do to so
  - Training on Performance Review Steps expected early 2017
- Apply what you have learned…

- Throughout the performance year:
  - Provide ongoing feedback with all employees
  - Check your employee(s) engagement.
QUESTIONS?
The following Implementation Team members by area who are available to answer your questions:

**Academic Affairs**
- Dr. Barbara Sanders
- Kevin Gilley
- W. Scott Erwin

**Athletics**
- Lacy Needham

**Finance & Support Services**
- Jeff Lund
- John McBride
- LynnAnn Brewer
- Marsha Moore
- Tammy Coyle
- Vanessa Salazar

**Information Technology**
- JaNelle Barnes
- Jodi Steen
- Joyce Munoz

**Office of the President**
- Dr. Gilda Garcia

**Student Affairs**
- John Rahmann

**University Advancement**
- Daniel Perry

Website
[www.hr.txstate.edu/performance-management.html](http://www.hr.txstate.edu/performance-management.html)

E-mail
[performancemgmt@txstate.edu](mailto:performancemgmt@txstate.edu)
THANK YOU