THE NEW PERFORMANCE MANAGEMENT PROCESS

EMPLOYEE TRAINING SESSION

TEXAS STATE UNIVERSITY
The rising STAR of Texas
OBJECTIVES

By the end of the training session, you should be able to:

- understand what is changing and your role in the new process;
- how the new process will benefit you as an employee;
- describe the new performance management process;
- understand the new performance criteria and new assessments;
- understand the importance of communicating with your supervisor.
WHAT IS CHANGING?

- Five key aspects are changing:

<table>
<thead>
<tr>
<th>Current</th>
<th>New</th>
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</thead>
<tbody>
<tr>
<td>One-time appraisal</td>
<td><em>Continuous</em> performance process</td>
</tr>
<tr>
<td><strong>Paper-based process</strong> <em>(Guidelines Oriented Job Analysis (GOJA))</em></td>
<td><strong>Online Process</strong> <em>(SuccessFactors software)</em></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</td>
</tr>
</tbody>
</table>
WHAT DOES THIS MEAN FOR YOU?

- More opportunities to...
  - understand how important your contribution is to the success of Texas State;
  - provide and receive ongoing feedback to your supervisor and others;
  - articulate what your professional and personal goals are to take control of your career path;
  - identify the resources and training you need to meet the assigned performance expectations;
  - discuss any difficulties regarding work performance and goal achievement.
THE NEW PERFORMANCE MANAGEMENT PROCESS
THE NEW PERFORMANCE MANAGEMENT PROCESS

PERFORMANCE PLANNING

MID-CYCLE REVIEW

PERFORMANCE REVIEW

June 1
WHAT IS YOUR ROLE?

1. Establish the Relationship
2. Understand Expectations
3. Exchange Feedback/Coach
4. Collaborate During a Crisis
5. Express Your Potential
WHAT ARE THE NEW COMPONENTS OF THE PERFORMANCE PLAN?

- **Goals**
- **Duties**
- **Competencies**
- **Behaviors**
- **Professional Development Plans**

- **Performance Criteria**
- **Work Environment**
- **Physical Demands**

- **Not Performance Criteria**
**HOW ARE THE NEW PERFORMANCE CRITERIA ASSESSED?**

<table>
<thead>
<tr>
<th>Goals</th>
<th>Duties</th>
<th>Competencies</th>
<th>Behaviors</th>
<th>Professional Development Plans</th>
</tr>
</thead>
<tbody>
<tr>
<td>Distinguished</td>
<td>Distinguished</td>
<td>Mastery Level</td>
<td>Frequently</td>
<td>Not Assessed</td>
</tr>
<tr>
<td>Valued</td>
<td>Valued</td>
<td>Advanced Level</td>
<td>Sometimes</td>
<td></td>
</tr>
<tr>
<td>Needs Improvement</td>
<td>Needs Improvement</td>
<td>Entry Level</td>
<td>Rarely</td>
<td></td>
</tr>
</tbody>
</table>
HOW DO YOUR GOALS CONNECT TO TEXAS STATE’S GOALS?

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

Reflect on:
how your role contributes to Texas State’s goals?
## DEFINING AND SETTING “SMART” GOALS

<table>
<thead>
<tr>
<th>S</th>
<th>Specific: Make goals precise and tangible to provide clear direction.</th>
</tr>
</thead>
<tbody>
<tr>
<td>M</td>
<td>Measurable: 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>Achievable: Choose a goal that is attainable given the current skill level, timeframe, and resources.</td>
</tr>
<tr>
<td>R</td>
<td>Realistic: Devise a plan that makes the goal reasonable</td>
</tr>
<tr>
<td>T</td>
<td>Time-bound: State the time for completion.</td>
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</table>

### Reflect on:

if you are prepared to talk with your supervisor about your goals?
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.

Reflect on:
is this a good example of a “SMART” goal?
If your current goals connect to Texas State goals?
## PERFORMANCE PLAN: WHAT TO EXPECT?

<table>
<thead>
<tr>
<th>TASKS</th>
<th>Benchmark Date</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step One</strong>  • Collaborate with your manager/supervisor about your performance goals</td>
<td>JUNE 30</td>
</tr>
<tr>
<td><strong>Step Two</strong>  • Log into the online system and review your performance plan</td>
<td>JULY 15</td>
</tr>
<tr>
<td><strong>Step Three</strong> • Have the 1:1 meeting with your manager/supervisor to review your performance plan</td>
<td>JULY 30</td>
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THE NEW PERFORMANCE MANAGEMENT PROCESS

PERFORMANCE PLANNING

MID-CYCLE REVIEW

PERFORMANCE REVIEW

October - November
THE NEW PERFORMANCE MANAGEMENT PROCESS

PERFORMANCE PLANNING → MID-CYCLE REVIEW → PERFORMANCE REVIEW

April - May 31
PERFORMANCE REVIEW STEPS 2017

- Manager Adds Job Duties: APRIL 7
- Employee Self-Assessment: APRIL 14
- Manager Performs Assessment: APRIL 26
- 1:1 Meeting: MAY 12
- 2nd Level Manager Review: MAY 17
- Employee Acknowledgement: MAY 22
- Manager Review: MAY 25
- 2nd Manager Acknowledgement: MAY 29
- Complete: MAY 31

= Benchmark Dates
= Required Date
NEXT STEPS

- Visit [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 the online performance tool.
- Attend Open Labs (Check performance-management website for dates).
- Reflect on your role in the new performance management process.

Throughout the performance year:

- Provide and receive ongoing feedback to your supervisor and others.
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**
  - Joyce Munoz
  - Jodi Steen
  - JaNelle Barnes

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

- **Student Affairs**
  - John Rahmann

- **University Advancement**
  - Daniel Perry

Website
www.hr.txstate.edu/performance-management.html

E-mail
performancemgmt@txstate.edu
THANK YOU