LOYOLA UNIVERSITY MARYLAND

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Performance Management
Program Guidebook

Contents

Introduction

is Program?

: As reflected in the Loyola University Vision and Values, Loyola will strive to provide all non-faculty employees with tools and development opportunities to excel at their jobs and improve the campus community. Employees have to take responsibility for their performance, professional growth and development.

Roles and Responsibilities: Employees are expected to become an active partner, taking responsibility for their performance and professional development plan. The supervi   role is to give the employees the tools to do the job and to offer ongoing feedback to ensure continued progress toward achieving University and employee goals.

Vision and Values:
                                sion and Values and how each individual carries out the Mission of the University.

Rating Scale: The Overall Performance Level rating should be consistent with the recommended range for merit increase.

Improved Performance: Loyola University   ce management program will help achieve individual, Division, and University-wide results by:

> opening up the lines of communication so employees and supervisors are working together to achieve the same goals;

> providing the tools and training to identify and reward good performance;

> allowing for additional input if an employee has more than one supervisor; and

> planning and improving future performance.

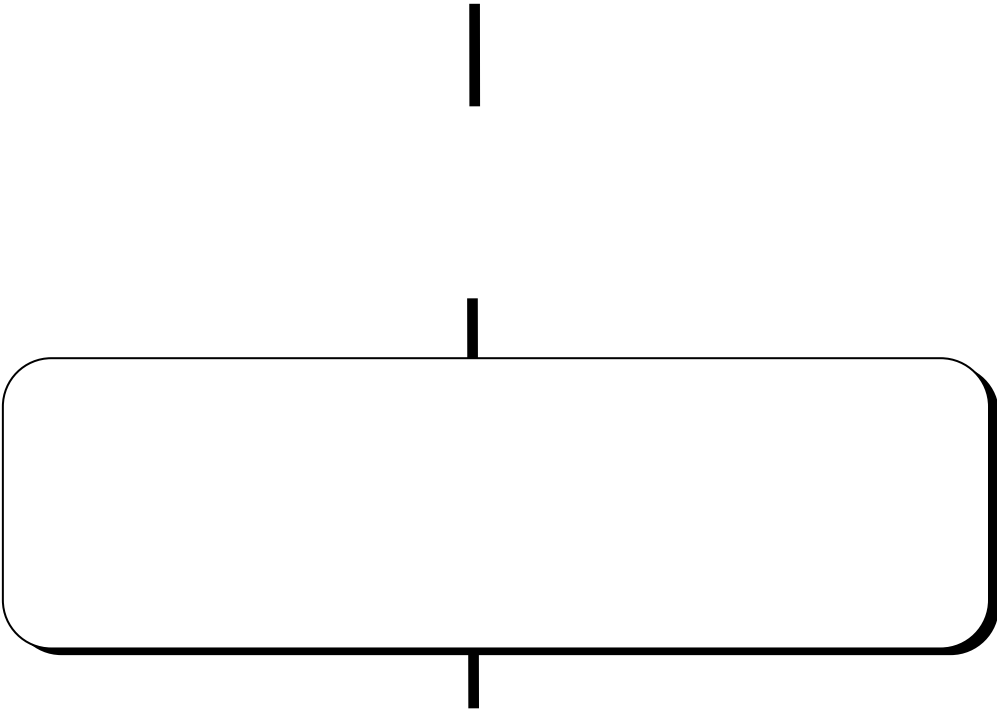Every aspect of the performance management program is intended to facilitate communication about work performance.

In order for this program to be effective, all supervisors and employees have to receive training. **Employees** need to understand the performance management program to improve their performance; **supervisors** need to learn how to improve their coaching and motivating skills. **All employees** need to learn how to give and receive feedback effectively.

What Is Performance Management?

Performance management is a set of strategies and actions designed to develop and utilize all of the individual talents that exist in Loyola University to achieve optimal results.

Performance management is an ongoing process that facilitates the planning, coaching and evaluating of employee performance. Employees play a major role in their own performance planning and development. Performance management gives supervisors and employees the tools to succeed.

Many organizations appraise performance — evaluating performance results and behaviors. Performance management allows organizations to manage performance with employees planning, monitoring and developing expected results and behaviors throughout the performance period. The performance review is just part of the performance management process.

Specifically, the performance management process involves:

> a meeting between supervisor and their employee at the beginning of the performance cycle to plan performance, set goals and plan development;

> providing continuous feedback throughout the period on performance, goals, directions and changing expectations;

> reviewing actual performance against expected performance at the end of the period; and

> developing plans to maintain and/or improve performance for the next period.

An effective performance management program will result in improved operations for Loyola University, more highly satisfied and motivated employees and better outcomes and services.

Employees and their supervisors are mutually responsible for successful performance management and professional development.

Employees must understand and accept that they are responsible for their own performance and professional development plan.

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Performance Management Schedule of Activities

Step 4: Prepare for review meeting

Who is involved: Supervisor and Employee, independently.
What form/tool: -Appraisal system:
                    (a) e-Appraisal Journal Notes
                    (b) Optional employee self-appraisal
                    (c) e-Appraisal form
When: Prior to review meeting

Phase I: Planning

Goals/Performance Standards (sample)

Too General: fix program modules

Better: test and debug programs and program modules, integrate modules into larger systems, meet programming time frames, program functionality specifications

"SMART" Goals

- **What:** Test and debug; integrate

- **To what:** Programs and program modules

- **How much:** Within functional specifications

- **When:** Within program time frame

Step 1: Setting Goals and Performance Expectations

The planning process begins with the performance planning meeting. Remember, once an employee completes the very first cycle of the performance management process, this meeting can be combined with the period-end performance review meeting. Therefore, the annual performance review and goal setting discussion occur at the same time. The supervisor and employee upcoming period.

1: Goals/Performance Expectations – This refers to specific goals, standards, performance expectations and/or professional development goals that will be accomplished in the upcoming performance period. These can include plans to develop performance attributes/competencies listed on the appraisal form.

The supervisor and employee goals for the coming period which are:

Specific -	Goal defined is exactly what should be achieved
Measurable -	Achievement of the goal is clearly observable
Acknowledged	Goal is understood by participants
Reasonable	Goal is consistent with business objectives, not too difficult or too easy
Tied to a timetable	Goal is to be achieved within a specific time frame

When the goal is complete, the following questions should be answered:

1a: (Optional) Weighting   Indicate the relative importance of each goal/performance standard by assigning weighting factors; total weights must equal 100%.

1b: Additional Information – List specific action plans, interim deadlines, available resources, etc. as appropriate for each goal/performance standard.

Next Steps

Agreement regarding these goals/performance standards is reached with the completion of this discussion.

Goals/performance standards created this period will automatically appear on the performance evaluation form for the next review period.

Phase II: Coaching

Step 2: Progress Updates

Process

Discussions, either formal or informal, should be held throughout the year to discuss progress toward goals or changes in responsibilities.

Significant modifications should be noted in the goals/performance standards section.

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│                     Tips and Techniques                       │
│                                                               │
│ If a supervisor is giving negative feedback, it should always:│
│                                                               │
│ Be private and confidential                                   │
│                                                               │
│ Be immediate (the sooner the feedback, the more effective it  │
│    is in influencing behavior)                                │
│                                                               │
│ Be specific, refer to specific behaviors, outcomes            │
│                                                               │
│ Include something positive                                    │
│                                                               │
│ Include the opportunity to improve performance                │
│                                                               │
│ Give feedback on performance, not personality                 │
│                                                               │
│                                                               │
│ Steps to follow when delivering negative feedback:            │
│                                                               │
│ Categorize and specify performance problem                    │
│                                                               │
│ Listen and summarize employee response                        │
│                                                               │
│ Offer your view                                               │
│                                                               │
│ Apply strength demonstrated to weakness observed              │
│                                                               │
│ Specify appropriate performance                               │
│                                                               │
│ Review downside of no change                                  │
│                                                               │
│ Develop goal and action plan                                  │
└─────────────────────────────────────────────────────────────┘
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What if the employee is not meeting expectations at the time of their performance review?

In most instances, working with a poor performer throughout the period, by providing feedback and discussing development needs, will result in successful performance.

In some cases, due to aptitude, attitude, or personal reasons, coaching and feedback will not result in successful performance. The supervisor will need to create a performance improvement plan and use the progressive disciplinary process to document the performance deficiencies.

Barriers to Accurate Performance Assessment

Halos and horns	Allowing outstanding or unsatisfactory performance in one area to influence assessments in another
Dramatic incidents	Looking only at extraordinary behavior, whether good or bad, and ignoring all other efforts
Recency	Assessing according to most recent events; not considering performance throughout the period
Past record	Being influenced by previous performance and assuming the employee will continue to perform the same, with neither improvement nor decline
Similarity	Assessing those like us higher than those who are different
Leniency	
Central tendency	Assuming everyone is about average; avoiding problems
Strictness	Assuming no one is perfect and being overly critical
Contrast	Comparing the jobs rather than evaluating performance against standards
Lack of information	Making evaluations with incomplete information
Laziness	Unwilling to thoroughly performance
Avoidance	Reluctant to discuss problems

No surprises.

In the meeting, give employees time to find the words.

Reviewing past performance

The first part of the meeting should focus on reviewing the employee   luation period. In effect, the s

Together, discuss each section of the evaluation form. The supervisor and employee should also discuss the overall performance evaluation, identify strengths and weaknesses, and discuss development opportunities.

Summary of Performance Management

A good performance management program helps people be more effective in their jobs, resulting in a more successful place to work. Specifically, any formal or informal discussion on performance, if carried out well, can have a positive effect on everyone involved