



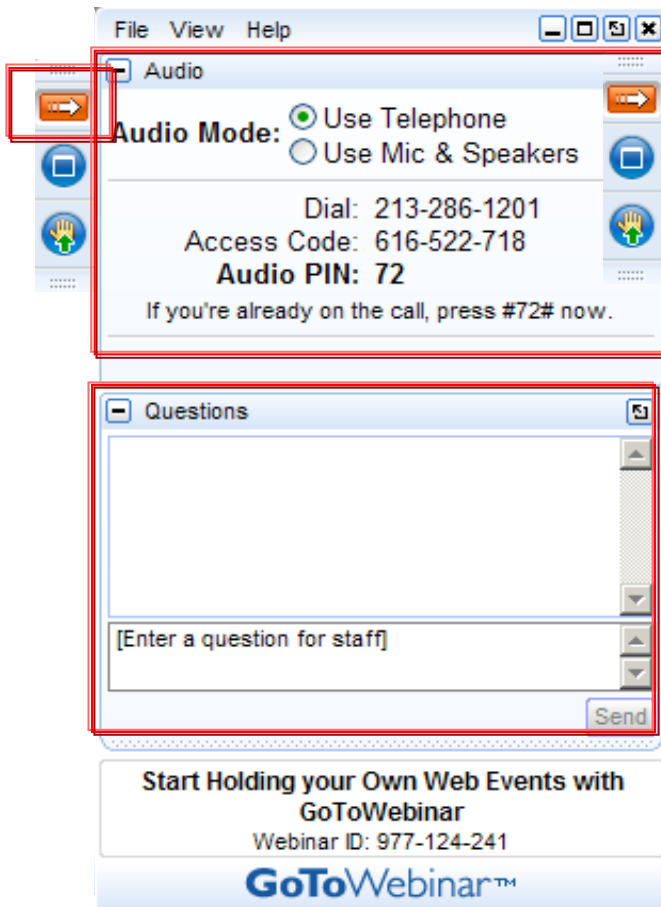
# Defining Performance Indicators, Standards, and Expectations Using the **New Yavapai College Staff Performance Management Review Form**

Presented by



**By Marnie Green, IPMA-CP, Principal Consultant**

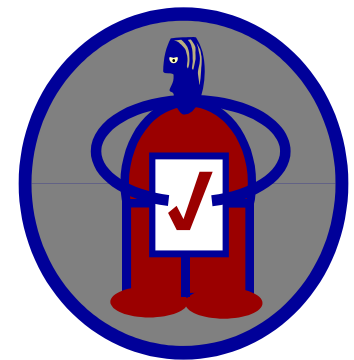
# How to Participate Today



- Open and close your panel
- View, select, and test your audio
- Submit text questions
- Please have a copy of the Staff Review Form on hand throughout the webinar
- A recorded version of today's session and the slides will be available on the YC Human Resources performance management website.

**Poll Time!**

***Who is on the line today?***



# About Marnie Green



- Principal Consultant, Management Education Group, Inc.
- Author of *Painless Performance Evaluations: A Practical Approach to Managing Day-to-Day Employee Performance*
- Supporter of supervisors, managers, and HR leaders who are charged with developing strong workplaces
- Presenter of past training for Yavapai College supervisors

# Our Plan for Today

**Getting involved in expectation setting**

**Yavapai College's new staff performance management review process**

**Using SMART goals to be clear**



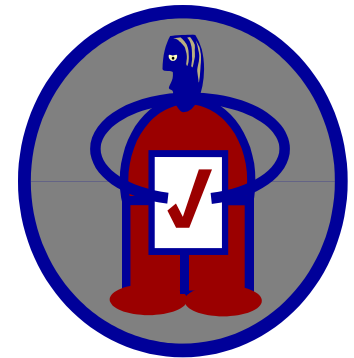
**A look at the new form**

**Performance planning with expectations and standards of performance**

**Brief overview of the practice of performance management**

**Poll Time!**

***How much do you know about  
the changes to the  
performance review  
process?***



- ***Result of the efforts of 13 Yavapai College faculty and staff members***
- ***Team made recommendations which were approved by the President's Leadership Team on June 7***
- ***Implementation of the new process begins immediately***

# Performance Management **Timeline**

<b><i>Today</i></b>	<b><i>Webinar to kickoff the new process</i></b>
<b><i>July 30</i></b>	<b><i>Performance plans due for each employee</i></b>
<b><i>September 1</i></b>	<b><i>Supervisor training – Documentation</i></b>
<b><i>December 1</i></b>	<b><i>Supervisor training – Performance Issues</i></b>
<b><i>June 30, 2012</i></b>	<b><i>Staff Performance Reviews Due</i></b>



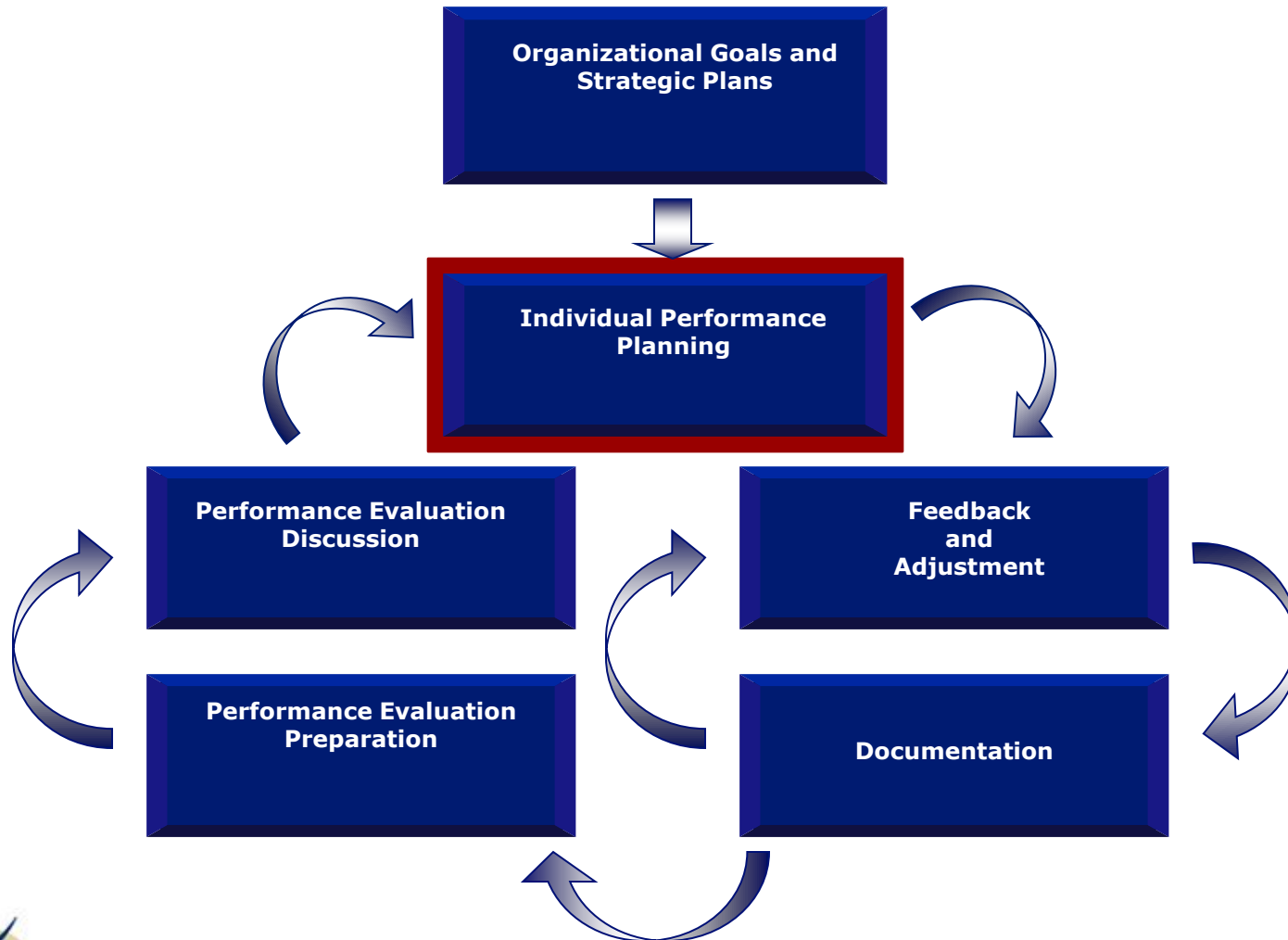
# Major Changes

- ***Applies to regular full-time employees and regular part-time employees***
- ***The practice of employee ratings of supervisors is discontinued and may be replaced with a climate survey***
- ***Employee self assessment is encouraged but ratings are not expected to be provided***
- ***Outstanding performance awards are discontinued and may be replaced with recognition of more specific objectives***
- ***New performance review form to be used as of July 1, 2011***

# Elements of the New Form

- ***Job Functions/Duties and Expectations***
- ***Competencies/Behaviors for Success***
- ***Goals***
- ***Overall Employee Performance***
- ***Employee Comments***

# Performance Management Cycle



***“Knowing what is expected” is highly rated as a determinant of employee satisfaction and performance effectiveness.***



# What is **expected**?

- ***Stay busy: When you are not serving students, update the files, order supplies, and maintain your desk manual.***
- ***Respond to student inquiries within one hour***
- ***When your work is completed for the day, seek to help a co-worker complete their work***
- ***Respond to voice mails and emails hourly***
- ***Prioritize work so that deadlines are met or let me know***

## *What is expected?.... continued*

- *If a personal call is received it should be taken in the back and not at the public counter*
- *If you are going to be late to work, call me on my cell phone as soon as you know you will be late*
- *If you are sick with a fever, stay home*
- *If the lobby is littered with paper or things are out of order, pick it up and straighten it out*

# Section I: Job Functions/Duties & Expectations/Standards of Performance

## Section I: Job Functions/Duties and Expectations/Standards of Performance

Describe the job functions/duties for this position for the review period. For each function, describe the expectations/standards of performance; these should be as specific, measurable, attainable, realistic, and time-oriented as possible and agreed-upon with the employee. Add more lines as required; however, this is not an all-inclusive list of job functions. Few jobs have more than 5 essential functions.

Rating: E - Exceeds Expectations M - Meets Expectation N - Not Meeting Expectations

<i>Job Functions/Duties and Expectation/Standard of Performance</i>	<i>Mid-Year Review</i>	<i>Rating</i>	<i>Year-End Review</i>	<i>Rating</i>
1.				
2.				
3.				
4.				
5.				

# Establishing Job Functions/Duties & Expectations/Standards of Performance

- ***What are the five (or fewer) major tasks or activities this position is expected to perform?***
- ***At the end of the year, what will this position have contributed to Yavapai College?***
- ***Why does this position exist?***



# Examples of Job Functions

- ***Maintains department website at all times with accurate information and links***
- ***Ensures full coverage of the front counter at all times***
- ***Manage meeting space for departmental events including communication with users, scheduling, and room maintenance***

## Section II: Competencies/Behaviors for Success

- ***Yavapai College Organizational Competencies identify knowledge, skills, and behaviors that all staff employees need in order to successfully carry out their job responsibilities.***
  
- ***There are five areas of competencies/behaviors:***
  - **Service Excellence**
  - **Interaction with Others**
  - **Job Specific Functional / Technical Skills**
  - **Continuous Improvement**
  - **Ethical Behavior**

# Section III: Goals

## **Section III: Goals**

Goals can reflect any of the following: 1) essential job function performance to be enhanced; 2) competencies/behaviors to be further developed; 3) specific areas in which performance improvement is required; 4) projects that support institution or departmental goals; or 5) professional development goals. Goals should be aligned with and linked to the overall goals and strategies of Yavapai College and the department and be as specific, measurable, attainable, realistic, time-oriented as possible. All goals should be discussed with and agreed upon with the employee. Add more lines as required; however, most employees will not have more than 3-5 stated goals. While not required, we encourage all employees to have at least one goal in this section.

**Rating: E - Exceeds Expectations M - Meets Expectation N - Not Meeting Expectations**

<b>Goals:</b>	<b>Mid-Year Review</b>	<b>Rating</b>	<b>Year-End Review</b>	<b>Rating</b>
1.				
2.				
3.				
4.				
5.				

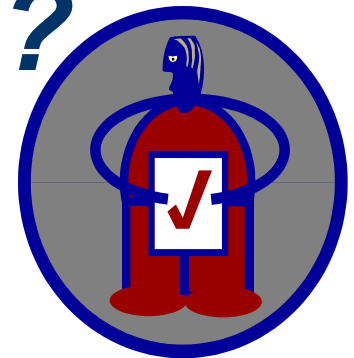
# Goal-Setting: A Mutual Endeavor



# Tips for Setting Mutual Goals

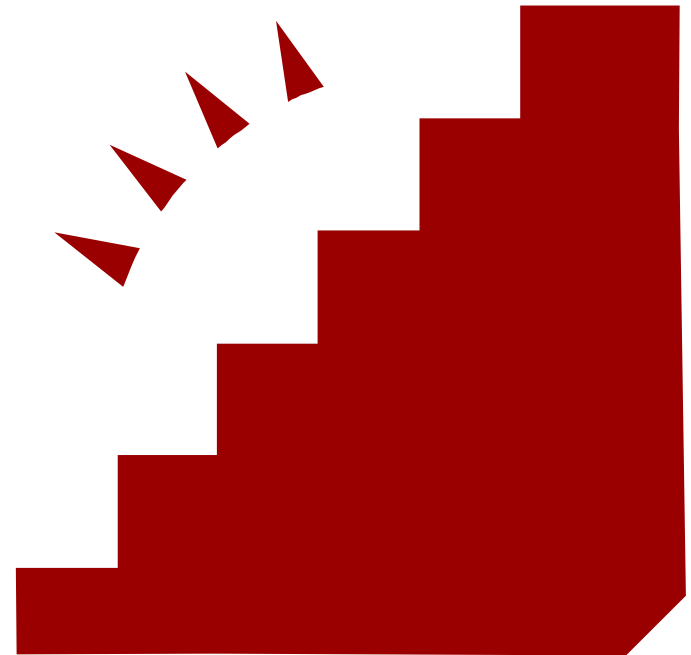
- *Have a goal-setting meeting in July*
- *Supervisors should give employees examples of likely goals tied to organizational or departmental goals*
- *Employees should prepare their own goals in writing before the meeting*
- *Be creative*
- *Be prepared for new ideas from the other party*
- *Give your full attention when discussing goals*
- *Have regular meetings to revisit and adjust goals*

***How would you describe the current use of performance goals at Yavapai College to help employees meet and exceed expectations?***



# Making Goals **SMAART**

- ***Specific***
- ***Measurable***
- ***Attainable***
- ***Agreed Upon***
- ***Realistic/Relevant***
- ***Time-oriented***



# Which is **SMAART**?

- 1. Improve your quality of customer service.***
- 2. Reduce the monthly average of products lost in production due to operator error to 5% during the next 12 months.***
- 3. Limit the number of student complaints related to your service to four per year.***
- 4. Complete the performance evaluation forms for each of your employees on or before the scheduled due date.***
- 5. Reduce returned postage charges by 5% before May 1.***
- 6. Reduce waste and loss in order to save money.***
- 7. Try to secure the board's approval for the new computer system by August 15.***
- 8. Promote a more positive work environment by communicating more effectively with others.***



# Types of Performance Goals

- *Essential job function performance to be enhanced*
- *Competency/behaviors to be further developed*
- *Specific areas where performance improvement is required*
- *Projects that support institution or departmental goals*
- *Professional development goals*



# Essential Job Functions to be Enhanced

- ***Deliver mail to all work sites by 3:00 each day.***
- ***Catalogue and reshelv all returned books within two hours of receipt.***
- ***Answer all calls within 15 seconds and route them to the appropriate department.***
- ***File quarterly reports to the IRS by deadline.***
- ***Produce four program segments each month.***

## ***Interaction with Others***

***Not SMAART:*** Improve your working relationship with Sally.

***SMAART:*** Meet with Sally on a quarterly basis to agree on ways to successfully coordinate the coverage of the front counter so that the counter is not left unattended during working hours.

# Performance Improvement Goals

- ***Answer the telephone within three rings using the standard greeting provided.***
- ***Return to your desk and be ready to serve students within 30 minutes of the start of your lunch break.***
- ***Submit weekly reports by 4:00 p.m. each Friday and ensure that the data submitted is free of error.***

# Project Goals

- ***Create three options for a new design for the non-credit class catalog and present your ideas to the board by November 20.***
- ***Develop and present a new workshop called “Advanced Applications” by September 30 and deliver it to 50% of the staff by December 31.***
- ***Develop and implement a new electronic filing system for pending student records by November 15.***

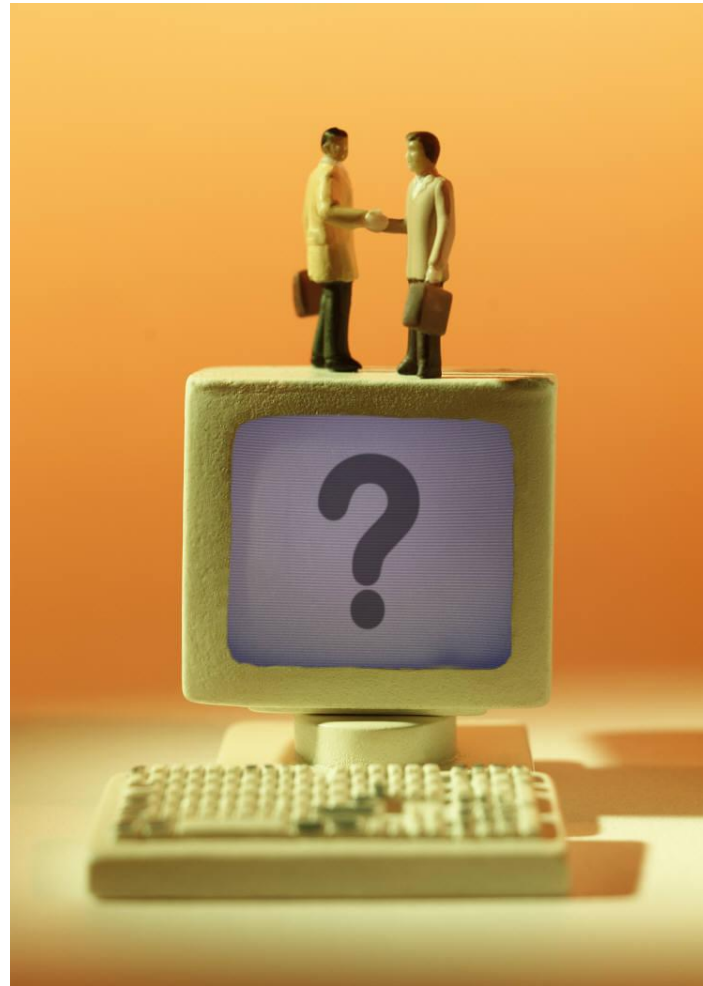
# Professional Development Goals

- ***Cross train in the Accounting Department at least one day a week and by October 31 be able to cover for the travel coordinator when she's away.***
- ***Attend a class on PowerPoint and develop a new slide show for new employee orientation by November 15.***
- ***Earn the required Commercial Driver's license (CDL) by July 25 in order to maintain your current status.***

# Involving Employees in the Goal-setting Process

- *Employees are expected and encouraged to participate in the goal setting process*
- *Keep a “me” file of ideas*
- *Come to the goal setting meeting with some ideas in writing*
- *Contribute to the conversation to influence its direction*

# Questions and Conversations







# Marnie E. Green

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