Performance Excellence
Training Agenda

• UA’s New Approach
• Plan Phase
  – Employee or Supervisor Initiate the review
  – Supervisor meets, listens, and sets expectations
• Perform Phase
  – Employee performs during performance period
  – Supervisor mentors and coaches during performance period.
• Evaluate Phase
  – Employee self-assesses
  – Supervisor assesses
  – Discuss and Finalize
UA’s New Approach

• Promotes focus on goals, competencies, and development
• Shared understanding of performance & expectations
• Online simplified and can be done frequently (not just annually)
• Either the employee or the supervisor can initiate
• Changes supervisor’s focus to coach and barrier remover
• Fosters listening to employees needs
“In a public survey Deloitte conducted recently, more than half the executives questioned (58%) believe that their current performance management approach drives neither employee engagement nor high performance. They, and we, are in need of something nimbler, real-time, and more individualized—something squarely focused on fueling performance in the future rather than assessing it in the past.”

“A manager’s role is to reach inside each employee and release her [or his] unique talents for performance.”

-First break all the rules
What Great Managers Do

• When selecting someone, they select for talent...Not simply experience, intelligence, or determination.
• When setting expectations, they define the right outcomes...Not the right steps.
• When motivating someone, they focus on strengths...Not on weaknesses.
• When developing someone, they help them find the right fit...Not simply the next rung on the ladder.
Effective Communication Skills

• Listen to understand until they feel you understand.
• Use empathetic listening if you hear emotion.
• Ask “What decisions did we make?”
The Evolution of UA’s Performance Management
New Performance Review Process

**PLAN**
- Set Goals
  Employee answers questions, sets draft goal(s)
- Review Expectations
  Employee and supervisor collaborate

**PERFORM**
- Performance Period
  Maximum of 1 year, ideal 90 days

**EVALUATE**
- Employee Rating
  Performed by employee
- Supervisor Rating
  Performed by supervisor

**Discuss Ratings**
Employee and supervisor

**Complete**
PLAN PHASE: Employee/Supervisor

- [www.alaska.edu/myua](http://www.alaska.edu/myua)
- Click on Employee Services Dashboard.
- Single Sign on with your ua username and password
PLAN PHASE: Employee/Supervisor

Welcome Employee, you are logged in

My Development
My Mandatory Activities
No data to display

Performance review
Team member's performance review

Performance Review (Supervisory)-FY18
Current step: Supervisor and Employee Discuss
Two Selections:
- Performance Review
- Performance Review (Supervisory)
PLAN PHASE: Supervisor

Two Options:

- Start a performance review for your employee
- View the employee initiated review

Two Selections:
- Performance Review
- Performance Review (Supervisory)
PLAN PHASE: Employee

Welcome to your performance review.

There are two phases in the performance evaluation process: Plan and Evaluate.

During this initial Plan Phase, please complete the goal section at the bottom of the Performance Evaluation.

In the Performance Review tab, review the competencies and draft your work goal(s) for the review period. You can finalize your goal(s) during your discussion with your supervisor.

Once you have completed the tabs, meet with your supervisor to discuss their expectations for the review period.

You will be able to rate yourself against these expectations during the next step, the Evaluate Phase.
PLAN PHASE: Employee Input

4 questions asked for the employee to answer:

- What are some accomplishments from last review period?
- What strengths and talents would you like to develop/use more?
- Do you feel you have the tools to do your job effectively?
- Are there barriers you face that we can work to reduce?
**PLAN PHASE: Employee Review Competencies**

<table>
<thead>
<tr>
<th>Competency</th>
<th>Measure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dependability</td>
<td>• Is punctual in attending work, meetings, and appointments&lt;br&gt;• Is reliable and follows through on commitments&lt;br&gt;• Completes assignments and meets commitments and deadlines</td>
</tr>
<tr>
<td>Collaboration</td>
<td>• Interacts effectively with a wide diversity of individuals and work styles&lt;br&gt;• Includes other employees and departments as needed for better results&lt;br&gt;• Resolves conflict productively for long-term effective relationships</td>
</tr>
<tr>
<td>Communication</td>
<td>• Ensures shared understanding of communications&lt;br&gt;• Listens to better understand and empathize with others&lt;br&gt;• Utilizes the best channel of communication for the receiver&lt;br&gt;• Demonstrates consideration and courage in communication of ideas and information</td>
</tr>
<tr>
<td>Initiative</td>
<td>• Works independently and makes decisions to deliver results&lt;br&gt;• Identifies and brings solutions to problems&lt;br&gt;• Develops ideas for process improvements&lt;br&gt;• Is aware and takes action when others need assistance</td>
</tr>
</tbody>
</table>
# PLAN PHASE: Employee Review Competencies

## Quality
- **Measure:**
  - Produces results in job and department responsibilities
  - Shows attention to detail, accuracy, follow-through and thoroughness
  - Uses strengths in position to deliver better outcomes
  - Demonstrates leadership in role and position
  - Complies with health and safety rules and procedures

## Quantity
- **Measure:**
  - Produces volume of work based on organizational and departmental need
  - Completes work within reasonable time limits
  - Manages time effectively and meets deadlines
  - Establishes and manages priorities effectively

## Commitment
- **Measure:**
  - Demonstrates passion for the position
  - Acts as a steward of the University
  - Acts with integrity and ethical standards

## Leadership
- **Measure:**
  - Manage safety and fiscal responsibilities
  - Support, motivate and develop employee(s) to successfully accomplish mission, vision and goals
  - Ensure mandatory employee training and performance evaluations have been completed
PLAN PHASE: Employee Set Work Goal(s)

• Develop at least one goal for the performance period.

• Define what success looks like if the goal is achieved
Training and Development

The University values your contributions, safety, well-being, and continuous growth. This section helps you track your training and development items from the e-learning library in your queue, as well as those suggested to you, and their completion status.

The Learning Library, available via the My Community link above, will continue to expand, so be sure to check back regularly for available training resources. Email ua-careers@alaska.edu if you have any suggestions for additional content.

Required training for all UA employees

One-time training requirements:
- Injury and Illness Prevention
- Hazard Communication
- Bullying in the Workplace

Annual training requirement:
- Title IX

You may be required to complete additional training based on your position and role within the organization. Please work with your supervisor to meet all training requirements.
PLAN PHASE: Training Assignments  
(Still a work in progress)

• Employee and Supervisor can see what the employee has in progress and completed.

• Employee and Supervisor can quickly add training, if needed.
PLAN PHASE: Employee Development Goal

• Set a professional development goal connected to employee and departmental needs
PLAN PHASE: Supervisor (After Employee Initiates)

• Review employee answers to questions & goals
• Print out summary & set up meeting with employee to discuss expectations and goals.
PLAN PHASE: Supervisor/Employee Meeting

- Employee and Supervisor discuss the employee responses to the 4 questions.
- Supervisor sets expectations for the employee in regards to the competencies.
- Supervisor and employee discuss goal(s).
- Set a timeline for performance. (quarterly, semi-annually, or at a minimum annually)
- Supervisor makes adjustments to the online document if needed.
- Click next step on summary page.
PERFORMANCE PHASE: Supervisor/Employee

• Supervisor mentors and coaches during the perform phase

WORK PERIOD

Hi [Employee]

During the work period your performance review there are no required actions needed. Once the work period is complete, select “Go to next step” on the Next Steps tab. This will move the review into the Employee Rating phase.

If you would like, you can use the Journal feature to document accomplishments. You can also add unplanned goals, that come up during the work period, on the Performance Review tab if necessary.
PERFORMANCE PHASE
EVALUATE PHASE: Employee

**Performance Review Tab:** Take a moment to rate your performance for each of the competencies and goals during this review period. Please enter any comments you have that your supervisor should take into account this evaluation cycle.

**Next Steps Tab:** Once you click 'Go to next step' on the Next Steps tab, your Supervisor will rate your performance for this review period.

The next step will be your supervisor's turn to rate your performance.
EVALUATE PHASE: Employee Rates Self

Only **three** ratings:
- Needs Improvement
- Meets Expectations
- Exceeds Expectations
EVALUATE PHASE: Employee Rates Self
EVALUATE PHASE: Supervisor

Welcome to the Evaluate Phase of your employee's performance review cycle. During this phase please complete the following steps:

**Performance Review Tab:** Review the competencies listed and rate your employee based on performance behavior during the current review cycle. Rate whether they were successful with goals. Also, you can note in the status if goals were no longer achievable or canceled.

If an employee earned a rating of "Needs Improvement," please make note of the Action Plan for that element in the comments section. Utilize the Action Plan Framework to develop an Action Plan, working in conjunction with your HR Consultant.

**Next Steps Tab:** Once you click 'Go to next step,' your employee will be asked to acknowledge the evaluation. At this time you will need to have a face-to-face meeting to discuss their performance during this review cycle.
Comments **required** if rating is “needs improvement”.

**Employee Performance Review (EVALUATE PHASE)**
Both the employee and supervisor are asked to assess the employee’s mastery of UA’s core competencies, considering the length of the employee’s experience in the position and field. Both employee and supervisor may provide comments.

If an employee has a Needs improvement rating under any section, the supervisor will document an Action Plan for the employee to become successful in that area, within the comments for that item.

- Dependability
  - Is punctual in attending work, meetings, and appointments
  - Is reliable and follows through on commitments
  - Completes assignments and meets commitments and deadlines

Supervisor

Meets Expectations

Employee

Meets Expectations
EVALUATE PHASE: Supervisor Review

› Do NOT hit “Go to next step!”

› Wait and schedule meeting with employee.

› Print the review and discuss with employee.

› Take notes and go back to add/change anything needed.

› NOW push “Go to next step”
ACKNOWLEDGEMENT OF EVALUATION

Hi [Employee],

Your performance review has been finalized. After speaking with your supervisor to review your mutual ratings and comments, please acknowledge the review. Acknowledgment of this review does not mean that you agree with the final outcome, only that you and your manager have discussed the review.

Once you select "Go to next step", on the "Next steps" tab, your review will be complete.
COMPLETION PHASE: Summary

- Performance Review (Supervisory)

Date: 13 December 2017

Classification Title: ____________

Position title: ____________

Brand Code: University of Alaska Statewide

User Name: ____________

Manager: [Supervisor]

Manager title: Human Resources Manager 3

Step: Complete

Completed date: Thursday, 20 July 2017

Grade: ____________

Your overall rating is based on the ratings your Supervisor gave you against your job responsibilities and goals.

Meets expectations
THANK YOU

UAF Human Resources:  (907) 474-7700

Contributions and design of this training were made possible by all 4 UA Campuses