Performance Reviews and Goal Setting

Agenda

• The value of performance management
• Setting expectations and goals
• Providing feedback
• Challenging discussions

Performance Management Is an Ongoing Process

- Provide feedback
- Set expectations
- Document, discuss, and reward
Why Bother?

- What about the process is of most value to you as an employee? What is of little value?
- What about the process is of most value to you as a manager? What is of little value?

Step 1: Set Expectations

- University expectations
- Job description
- Goals (approximately 1-3)

Performance is...

What + How + Goals
A goal describes one end-state or specific result desired.

Action steps and milestones help you get there!

Goal Types

**Innovative:** develop a new process, tool, or system

**Problem solving:** solve an existing challenge or problem

**Efficiency:** improve a current process

**Professional growth:** improve job skills and knowledge

Set **SMART** Goals

- **Specific**
- **Measurable**
- **Attainable**
- **Realistic**
- **Time frame**
Writing Powerful Goals

- Include details and action steps
- **Goals should align** (departmentally, organizationally)
- Make sure they are high enough
- List possible obstacles and how they might be overcome
- Identify help needed and from whom
- Identify measurements and milestones

Sample Goal 1

**Schedule training for staff regarding p-cards.**

Sample Goal 2

**Train all departmental staff on the new p-card payment management portal by January 29, 2016 and ensure that all are proficiently using the new portal by February 17, 2016.**
Step 2: Provide Feedback

Feedback Categories

• Silence
• Criticism
• Advice
• Reinforcement

Meaningful Feedback

• Be timely
• Refer to specifics (job-related)
• Give examples (behaviors, results, etc.)
• Avoid assumptions
• Describe the impact
• If positive, thank - OR -
  • If corrective, solicit input and share potential consequences (if appropriate)
Beware of Biases

- Good Past Record
- The Perfectionist Boss
- Everyone Gets the Same Rating
- The Easy Rater

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Document and Discuss

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Document and Discuss

Prepare for the Performance Review

- Job description
- Performance standards
- Progress on current goals
- Significant events
Document and Discuss

1. Performance vs. expectations
2. Do you need to clarify job responsibilities and expectations?
3. Identify strengths and areas for growth
4. Think about goal ideas for the next review period

Completing “The Form”

It’s a tool to facilitate discussion

- Gather employee input
- Assess the entire review period
- Be specific and use examples
- Identify strengths as well as areas for growth

Document and Discuss

- Structure the meeting
- Listen to the employee
- Give your evaluation
  - Discuss strengths and areas for growth
  - Focus on job performance
- Develop goals together
- Plan your follow-up
Challenging Discussions

Not every review discussion goes as planned...

Challenging Discussions

Overly Agreeable:
• Confront inconsistency
• Give them time to digest the feedback
• Ask directly for response

Challenging Discussions

Reticent:
• Ask open-ended questions
• Comment on the silence; encourage participation
• Allow time to collect thoughts
• Listen and paraphrase what you heard
• Move on to action steps
Challenging Discussions

Debater:
• Listen and paraphrase
• Ask questions
• Don’t debate
• Restate your concern/position
• Focus on action plans
• Establish milestones and follow-up

Challenging Discussions

Emotional:
• Listen; let them vent
• Don’t argue or retaliate
• Don’t attempt to explain or persuade until they calm down
• Refocus on the behavior, not the person
• Reschedule if necessary

Post-Review Assessment

• Did the employee understand the expectations?
• Did the employee understand my assessment?
• Do I understand the employee’s point of view?
• Did I provide ongoing feedback throughout the review period?
Post-Review Assessment

• *Were the goals SMART and did I have enough follow-up meetings to discuss goals?*

• *What can I do differently this next review period?*

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Agenda Recap

• *The value of performance management*

• *Setting expectations and goals*

• *Providing feedback*

• *Challenging discussions*