

**HRnovations**  
Your Partner in Growth

# Performance Reviews and Goal Setting



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## Agenda

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

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## Performance Management Is an Ongoing Process



Provide feedback

Set expectations

Document, discuss, and reward

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## 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?*



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## Step 1: Set Expectations



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



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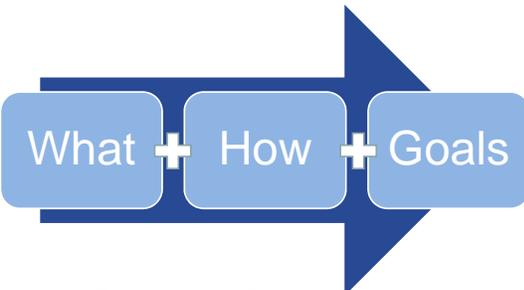
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## Performance is...



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A goal describes one end-state or specific result desired.



*Action steps  
and  
milestones help  
you get there!*

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### 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*

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### Set SMART Goals

- S**pecific
- M**easurable
- A**ttainable
- R**ealistic
- T**ime frame



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## 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**

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## Sample Goal 1

Schedule training for staff regarding p-cards.

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## 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.

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## Step 2: Provide Feedback



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## Feedback Categories



- Silence
- Criticism
- Advice
- Reinforcement



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## 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)

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## 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



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**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

*No surprises!!*

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**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



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**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

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## Challenging Discussions



*Not every review discussion goes as planned...*

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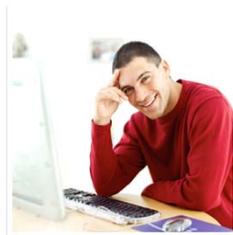
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## Challenging Discussions

### Overly Agreeable:

- Confront inconsistency
- Give them time to digest the feedback
- Ask directly for response



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## 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

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## Challenging Discussions



### Debater:

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

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## 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



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## 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?*

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## 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**

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