

Performance Management Initiative

At the University of Florida

http://hr.ufl.edu/emp_relations/performance

Today's Agenda

- Introduce “performance management” as a general concept
- Review the importance of formal and informal feedback as part of performance management
- Reintroduce UF’s performance management appraisal form

Performance Management

- Performance management is designed to:
 - Ensure employees understand the measurements and standards for which they're being evaluated
 - Promote a sense of fairness
 - Help employees identify and develop skills and behaviors needed to be successful

Our Overall Objective

- To achieve optimal results from UF employees by establishing and communicating integrated performance measures and goals

Guidelines for Performance Management

Workplace Feedback

- Job performance
 - The employee's demonstrated competence to perform specific tasks
- Work-related behavior
 - The way the employee performs his or her tasks

Two Types of Feedback

- Reinforcement
 - To get the behavior or outcome again
- Redirection
 - To get a different behavior or outcome

Effective Feedback Is ...

- Focused on acts, not attitude
- Inquiring
- Timely
- Directed toward the future
- Goal oriented
- Supportive
- Continual

ABCs of Documentation

- **A**ccurate
 - Don't speculate or guess
- **B**ehavioral
 - Be specific
- **C**onsistent
 - Maintain documentation on all employees in work group

The UF Performance Management Process

http://hr.ufl.edu/emp_relations/performance

UF Appraisal Period

- Annual Appraisal: In March of each year
 - Unless another appraisal was completed within the last 60 days
- **All** employee appraisals completed using same evaluation period:
 - March 1, 2007-February 29, 2008

UF Appraisal Period

- Appraisal presented to employee and returned to HR by March 31, 2008

Formats for UF Appraisals

- UF Appraisal Form used for:
 - All nonexempt TEAMS
 - Both exempt and nonexempt USPS employees
- Narrative (letter) used for:
 - Exempt TEAMS

UF Form Default Ratings

- No completed probationary appraisal?
 - “Achieves” by default
- No annual appraisal?
 - The previous rating continues

Appraisal Period Impacts

- Leaves of Absence
- Probationary Periods
- Special Appraisals

Leaves of Absence

- Rating periods for employees on leaves of absence are not adjusted
 - Period of absence should not be considered in the evaluation
 - Evaluations may be submitted late—within 30 days of the employee's return to work after the leave of absence

Probationary Appraisals

- Typically completed during an employee's sixth month
- If the probationary period ended before December 31, you will also complete the annual appraisal in March
- If the probationary period ends after December 31, you will skip the annual appraisal in March

Special Appraisals

- Covers evaluation for period of 60 days to 6 months
- Notes changes in performance
- Recommended contact with HR if you believe a special appraisal is warranted
 - Definite contact when overall performance is declining

UF Performance Appraisal Form

http://hr.ufl.edu/emp_relations/performance

To Begin

- Complete information for employee identification
- Identify *Appraisal Type*
- Identify *Appraisal Period*

Employee's Self-Assessment

- Provides comments (*not numerical ratings*) on performance categories
 - Work performance*
 - Attendance/reliability*
 - Customer/service*
 - Initiative/productivity*
 - Teamwork and interpersonal skills*

*Same evaluation categories used by supervisors

Employee's Self-Assessment

- Identifies goals for the next year

Supervisor's Assessment

- Remember: Nothing on the form should be a surprise
 - Evaluation form formalizes your on-going feedback to employees
- Provides comments on performance categories
 - Work Performance, Attendance/Reliability, Customer Service, Initiative/Productivity, and Teamwork and Interpersonal Skills

Supervisor's Assessment

- Provides ratings for each category
 - Below Performance Standards: 1
 - Minimally Achieves: 2
 - Achieves: 3
 - Above average: 4
 - Exceeds: 5
- May use *Ratings Guide* to assist

Supervisor's Assessment

- Writes goals for the next appraisal year
- Adds for *Total Score*
- Determines *Overall Rating*

Overall Rating

- Below (5-9)*
- Minimally Achieves (10-14)*
- Achieves (15-19)
- Above Average (20-23)
- Exceeds (24-25)

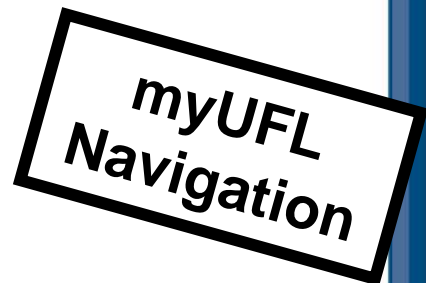
*Contact ER before assigning an overall rating of “Below” or “Minimally Achieves”

Remarks/Signature Block

- Room for employee remarks
- Signatures needed by:
 - Employee
 - Immediate supervisor
 - Higher level supervisor
- Additional space for more comments from the supervisor (if needed)

To Close

- Original to employee
- Copy sent to Employee Relations
 - Overall rating entered into PeopleSoft
- Rating will be available for viewing
 - Role: UF_HR Manager/Dept Admin
 - Compensation
 - Salary Planning
 - Employee Review History
 - » Review History



Before the Session

- Talk to your employees about
 - The UF Performance Appraisal Form
 - Appraisal time frame
 - Five evaluative performance categories
 - Five ratings
 - Self-evaluation and supervisor evaluation

Before The Session

- Provide employee with Self-Assessment page to be completed before appraisal session
 - Ask the employee to return it to you before the appraisal session or to bring it to the session—your choice

The Appraisal Session

- Choose a convenient time
- Choose an appropriate location
 - Provides privacy
 - Is away from immediate work area

The Appraisal Session

- Inform employee of the purpose
- Plan your meeting
- Begin and end with a positive
- Emphasize growth and development
- Encourage open discussion
- Avoid joking

Common Rating Errors

- Carry-over
- Incentive
- Central tendency
- Halo/pitchfork effects
- Guilt by association
- Compatibility

Inflated Appraisals

- Can affect
 - Appraised employee
 - Other employees
 - The organization

HR Offices

- Education and General, Auxiliaries
 - 392-6615
- Health Science Center
 - 392-3786
- Physical Plant Division
 - 392-2333
- IFAS
 - 392-4777

Performance Management Initiative

Please sign the Attendance Roster before
departure.