Performance Management and Appraisal Training for Employees

Office of Employee Services

April 22, 2015
Training Objectives

• Performance Appraisals
  – Who, When, Why, What and How
• Review of the Performance Appraisal Framework
• Preview Performance Pro
  – A guided tour
• Resources
Who needs a Performance Appraisal?

• Benefits eligible Classified and A&P employees
• New/Probationary employees who **have not** completed a 90 or 180 day appraisal between 3/1 and 5/31.
• Related UT System policies: INT107 and INT131
When are appraisals conducted?

- **Appraisal Timeline:**
  - Begin in April 2015
  - Completed by June 2015

- **Appraisal Review Period:**
  - June 1, 2014 to May 31, 2015
  - **New Employees:** Start Date to May 31, 2015
Why do we conduct appraisals?

- Participate in developing your goals and development plan
- Clarify expectations
- Create an environment of open communication
- Provide a record/foundation for merit increases
- State law requires institutions to establish criteria for awarding merit increases.
What is involved in the appraisal process?

• Self Appraisal/Goals
  – Where have I been?
  – Where do I want to go?
  – What are the gaps?
  – SMART Goals

• Manager Evaluation

• Appraisal Review Meeting (Employee/Manager)

• Employee and Manager E-Sign Completed Appraisal
Setting Goals (SMART)

- **Specific**: What is the employee expected to deliver?
- **Measurable**: How do you know if the goal has been reached?
- **Achievable**: Can the goal be accomplished?
- **Relevant**: Will this goal lead to the desired results?
- **Time-bound**: “by when?”
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<thead>
<tr>
<th>Performance Factor</th>
<th>Weight</th>
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<tr>
<td><strong>Accomplishments:</strong></td>
<td>40%</td>
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<tr>
<td>• Work Plan, Goals, Duties and Responsibilities/ Other Accomplishments</td>
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<td><strong>Accountability:</strong></td>
<td>20%</td>
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<td>• Quality</td>
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<td>• Reliability</td>
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<td><strong>Knowledge, Skills, and Abilities</strong></td>
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<tr>
<td>• Communication</td>
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<td>• Job Knowledge</td>
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<td>• Teamwork</td>
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<td><strong>Commitment to Excellence</strong></td>
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<td>• Initiative &amp; Innovation</td>
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<td>• Customer Service</td>
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<td>• Mission Support</td>
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## Performance Factors: Supervisor/Senior Staff

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<td>• Leadership</td>
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<td>• Identify, Hire, Develop, &amp; Retain</td>
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Rating Scale

UT System uses a five-point rating scale for factors and overall performance:

- **Outstanding Performance**
  - Exemplary accomplishments throughout the rating period and/or represented by unique and unusual accomplishments and result in specifically identifiable or quantifiable benefit to System Administration or the institutions.

- **Very Good Performance**
  - Exceeded the expectations and requirements of the assigned position and regularly produces expected accomplishments in all areas of responsibility.

- **Good Performance**
  - Meets job expectations and requirements and may occasionally exceed performance objectives.

- **Needs Improvement**
  - May meet some of the job expectations but does not fully meet the remainder.

- **Unsatisfactory Performance**
  - Fails to meet defined expectations and minimum job requirements.
Performance Pro:

1. Access UT4U [http://www.utsystem.edu/ut4u/homepage.htm](http://www.utsystem.edu/ut4u/homepage.htm)
2. Navigate to Resources/Employee Services/ Performance Management (the link will also appear under Announcements temporarily)
3. Select The University of Texas System Administration as your home institution
4. Enter your SNAC login and password
5. Press Enter on your keyboard or click the Login button
STEP 1: Evaluate Factors
From the Main Menu, under Appraisal, click Evaluate Factors. If employee name is not shown at the top of the page select it from the employee list box. Select a factor to evaluate from the Overview tab.
STEP 1: Evaluate Factors (continued)
Select a factor to evaluate under the *Evaluation* tab. Next, select a rating for the factor. Enter comments. Repeat this step for each factor.
Step 2: Evaluate Goals (if applicable)
From the *Main Menu*, under *Appraisals*, click **Evaluate Goals**. Next, select a rating for the goal. Enter comments. Repeat this step for each goal.
Prior to evaluating on the overview tab.

View after goal has been evaluated.
Step 3: Set New Goals for the Future (if applicable)
1. From the Main Menu, under Employee Documents, click Employee Goal Tool, Future Goals Tab.
2. Click the Add New button.
Step 4: Summary Comments and Ready for Meeting

From the Main Menu, under Appraisals, click **Summary Comments**. Click in the **Summary Comments** box and enter any additional information, concerns, etc. (if desired). Enter information in any additional comment fields appearing on this screen.
WARNING: THIS IS YOUR LAST CHANCE TO MAKE CHANGES. Once you mark the appraisal as ready you may not change it.
Step 5: E-Signing the Appraisal

YOU HAVE COMPLETED YOUR SELF-APPRAISAL!
Viewing Your Current Appraisal

From the Main Menu, click **Home**. Click **Current Appraisal**. You may view your assigned factors and goals and your self-appraisal scores. Completed appraisals, which include the appraiser’s scores, cannot be viewed from this screen.
**Performance Appraisal Process**

**Step 1:** Review Notes

**Step 2:** Evaluate Factors

**Step 3:** Evaluate Goals

**Step 4:** Set Future Goals

**Step 5:** Ready for Meeting

**Step 6:** Merge Appraisal

**Step 7:** Complete the Appraisal

**Step 8:** Sign the Appraisal

**Employee Self Appraisal**

**April - June**

**June**

**Employee**
Resources

• UT System Performance Management Website
  – UT4U Performance Management Site
  – FAQ’s
  – Appraisal Guide
• OES SharePoint
• PerformancePro homepage
• HR Business Partner