

Performance Management Best Practices

SMPH HR Lunch & Learn Series

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Learning Targets



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By the end of today's session,
you will be able to:

01

Articulate the goals
of performance
management.

02

Describe the
supervisor's
responsibility for
performance
management.

03

Apply techniques for
delivering feedback
and documenting
employee
performance.

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Our agenda:

MANAGING PERFORMANCE

EMPLOYEE EVALUATION

CONSTRUCTIVE FEEDBACK

SMART GOALS

VIGNETTES

Q&A

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What are the
goals of
performance
management?



Develop people



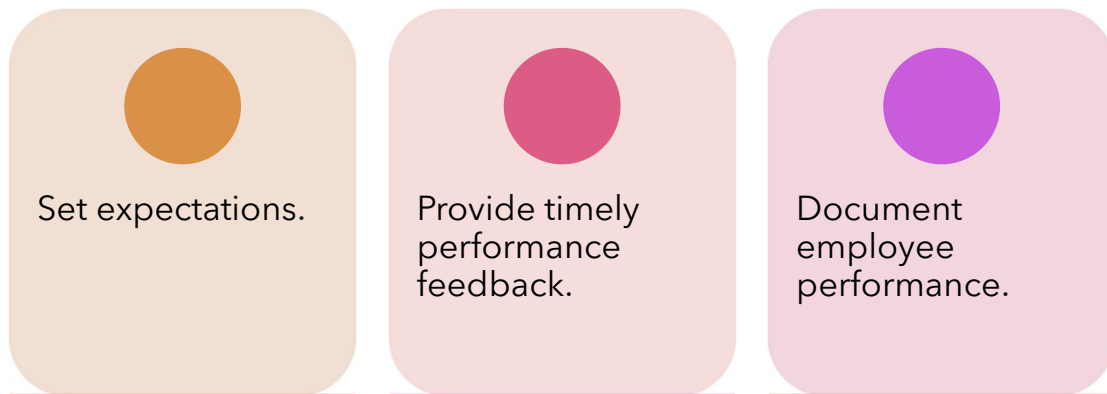
Reward equitably



Drive organizational
performance

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What are the supervisor's responsibilities in performance management?



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PMDP Components (Summary Evaluation)



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What should be discussed and documented?

At minimum, the summary evaluation conversation should include a discussion of:

- Whether the employee's performance met expectations
- Whether the employee achieved annual goals
- Professional development needs and opportunities
- Options to develop additional skills and knowledge to foster career growth.

The following must be documented:

- Job Expectations
- Goal-setting
- Mid-point conversation
- Summary evaluation

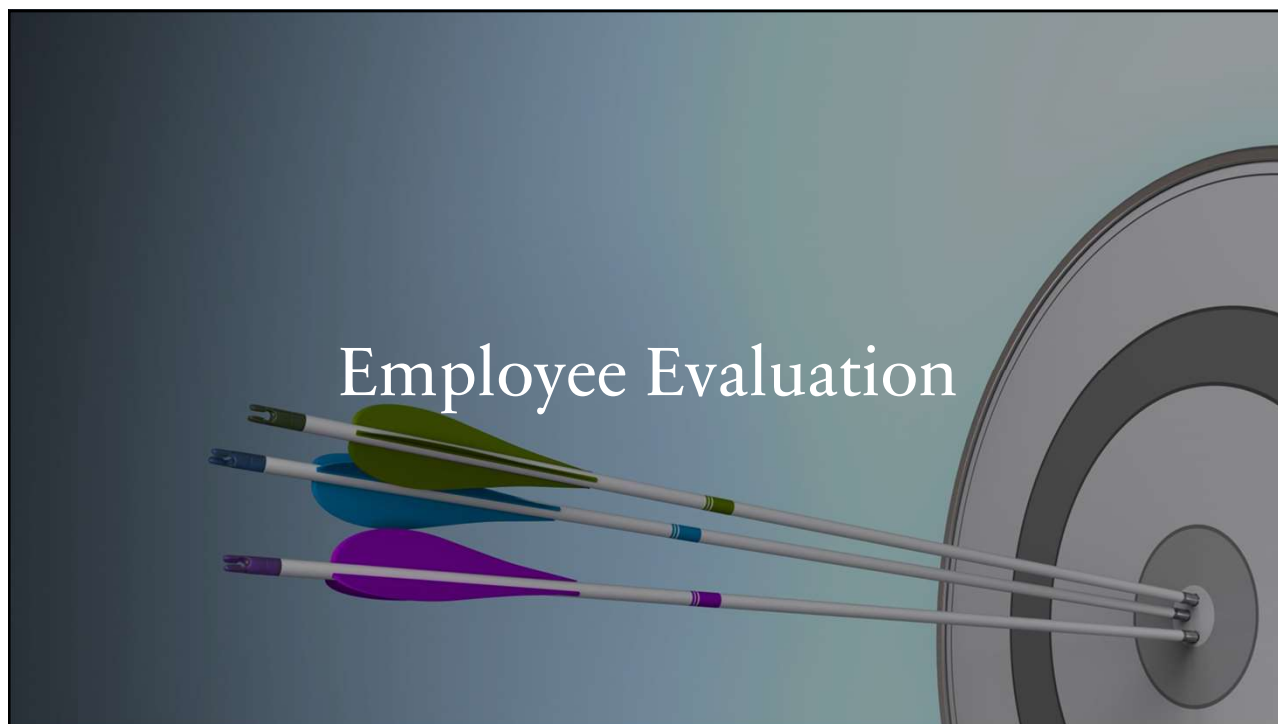
See [*Performance Management for Managers and Supervisors*](#).

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How do you rate performance?



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What are we
evaluating
during the
performance
period?

Job Responsibilities: provide general responsibilities of the role; this is the TTC standard job description (SJD).

Expectations: lend specificity to the general responsibilities; this is what the employee is expected to do in the role, in the specific work unit.

Competencies: set forth *how* an employee is expected to go about their work; these can be found in the Criteria for Success (in PMDP) and the [SMPH Shared Guidelines for Professional Conduct](#).

Goals: constitute co-created objectives that an employees works towards achieving during the performance period; these often consider the employee's desire for growth, requirements for a future desired role, and resource availability.

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Example: Elly Rae, employee relations specialist

Job Responsibility

- The ER specialist drafts, updates, and presents training material for employment relations programs.

Expectations

- Elly Rae is expected to plan, develop and deliver various ER trainings and workshops to the SMPH community.

Competencies

- Elly Rae develops and delivers trainings and is accountable for the quality and timeliness of that work. They can be relied on to achieve these results without significant oversight.

Goal

- By June 30, 2023, Elly Rae will develop and deliver at least five ER trainings specifically created for the SMPH HR team in order to help enhance HR teammate skills in the area of employee relations and support their delivery of excellent HR services across the school.

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Constructive Feedback



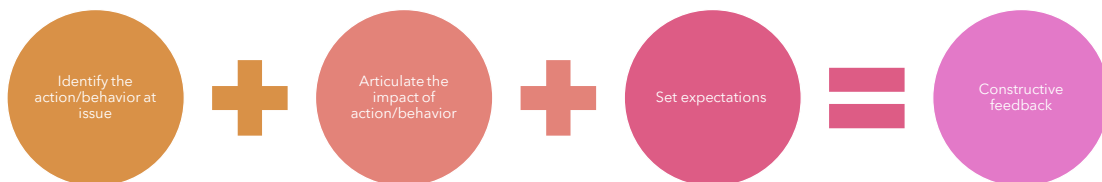
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What is constructive feedback?

Feedback aimed at achieving a positive outcome by providing someone with comments, advice, or suggestions that are useful for their work or their future.

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Elements of constructive feedback



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Tips for constructive feedback

Be specific.

Be timely.

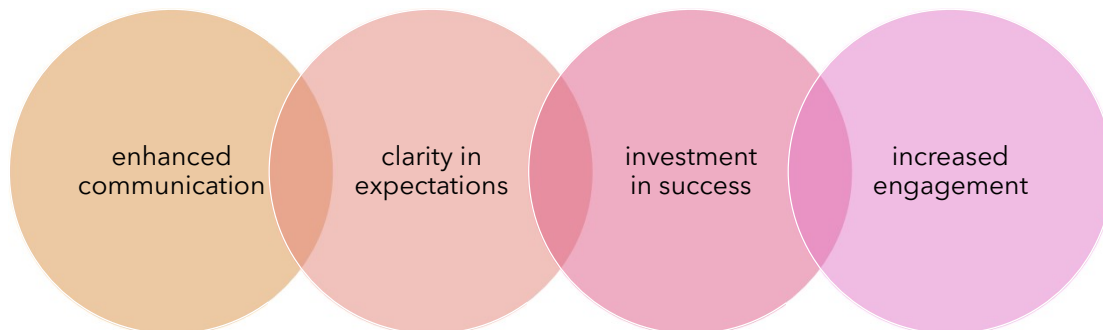
Give actionable advice.

Show your appreciation. (Be positive.)

Listen to your employee. (Demonstrate [active listening](#).)

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Benefits of constructive feedback



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Constructive feedback examples

An employee speaks over others and interrupts in team meetings.

- Feedback: "I've noticed you can cut off team members or interrupt others. You share plenty of good ideas and do good work. To share some [communication feedback](#), I'd love to see how you can support others in voicing their own ideas in our team meetings."

An employee heavily relies on co-workers to help them solve issues and needs to build independent problem-solving skills.

- Feedback: "I appreciate your enthusiasm for collaboration and asking for help when you need it. I believe in your resourcefulness and would like to see you try to find the answer on your own rather than turning to others immediately. I want to make sure our team does not get too distracted. You can take an extra 10 minutes to search online or look elsewhere. Come to me if you are still having trouble, and we can work on finding a solution."

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What is a SMART goal?

Specific
M measurable
Achievable
Relevant
Time-bound

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Why is goal-setting important?

Goal-setting can play a key role in performance management and career development.

Goals can be tested against what the employee wants to achieve, avoid, eliminate or preserve to ensure the employee is focused on the right things at the right time.

Setting goals is required by policy.

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Tips for setting and managing goals

Goals should be co-created by the employee and their manager.

The employee self-evaluation is an important source of information for developing goals for the upcoming performance period.

Information gathered during stay interviews and developing stay plans can also be used to formulate future goals.

Less is sometimes more; developing too many goals can be counter-productive.

In managing the completion of goals, it is helpful to identify objectives describing the results to be achieved, the way they will be achieved, and deliverables.

Don't let PMDP work against you!

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Vignette #1

In the "Professionalism" category in "Criteria for Success," the employee received a rating of "Partially Meeting Expectations." The rating explanation indicates the following: "[Employee] periodically—but not always—acts professionally in the workplace. Most notably, [employee] sometimes is discourteous and disrespectful to co-workers."

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Take Aways

- Encourage the employee to stay professional (e.g., addressing employee's agitated state).
- To the extent possible, answer reasonable questions the employee may ask (e.g., seeking clarification on a rating).
- If employee has input into the evaluation, listen to the employee's point of view and, ultimately, make the decision you believe is right (e.g., decision not to change rating).

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Vignette #2

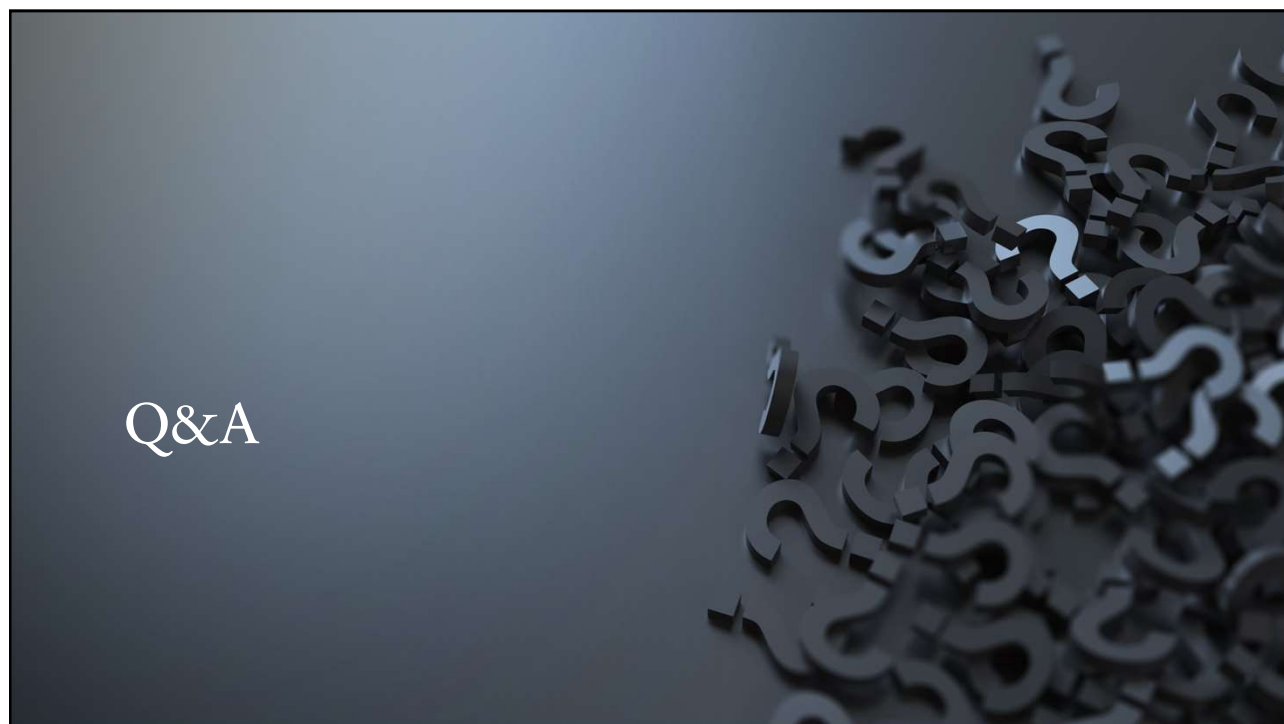
The employee has been in the department for a decade and has always received an overall rating of “meeting expectations.” In July 2022, a different person took over supervision of the employee. The new supervisor noticed performance concerns and communicated those to the employee over the past year. The employee is now receiving an overall rating of “not meeting expectations” on the evaluation.

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Take Aways

- Give honest feedback based on your observations, which may or may not align with those of a previous supervisor.
- Give full picture of performance. Few employees are truly “exemplary” in all areas or “not meeting expectations” in all areas.
- If employee references medical information, refer to campus resources (e.g., SMPH FMLA and Accommodation Teams).

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