

Performance Management Workgroup Report Executive Summary

The Performance Management Workgroup was charged with the following: (1) review existing UWSA policies and guidelines; (2) provide insight into what works and what doesn't work in the current performance evaluation process; and (3) develop recommendations for a desired future state from both staff and supervisor perspectives.

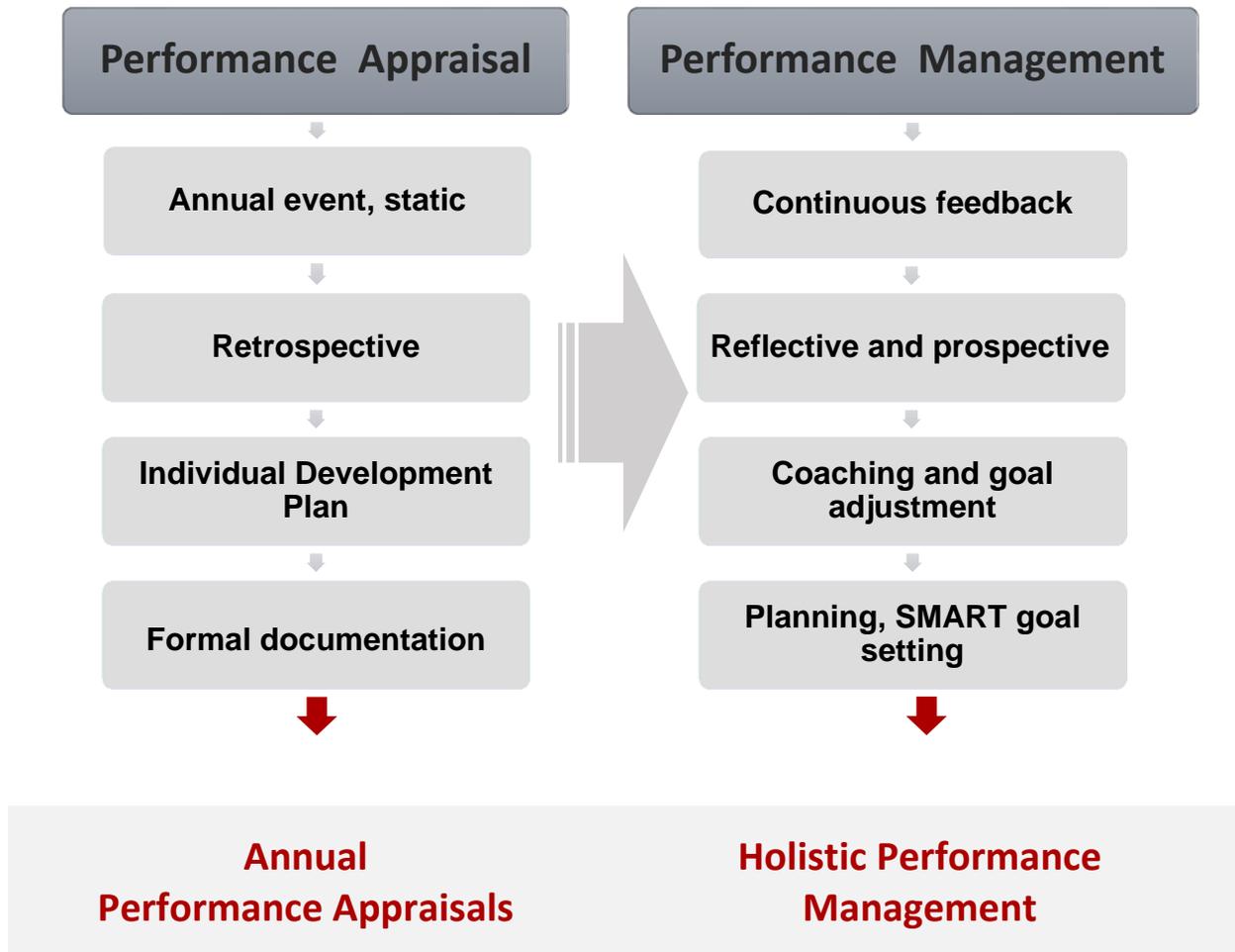
After several months of meetings, research and discussion, the workgroup developed the following recommendations:

- 1. Adopt a holistic Performance Management Philosophy & Process**
 - a. Performance managed in a comprehensive way
 - b. Coaching, constructive performance feedback are ongoing
 - c. Performance is measured against SMART goals
 - d. Formal mid-cycle review
- 2. Rating Instrument**
 - a. Revise rating scale from 5 ratings reduced to 3 ratings
 - b. Develop consistent evaluation standards
 - c. Consolidate evaluation tools
- 3. Strengthen employee and management competency**
 - a. Training, education, career and professional development
 - b. Topics: performance conversations, coaching and constructive feedback
 - c. SMART goal setting, accountability and formal check-ins
- 4. Organizational goals and objectives aligned**
 - a. Cascaded down to division / department
 - b. Employee goals and performance expectations aligned with organization, division and department goals
- 5. Go Paperless – implement e-performance HRS module (or another alternative)**
 - a. Eliminate paper processes
 - b. Electronic signatures and tracking
- 6. Define UWSA Core Values**
- 7. Consider alternative performance review cycle (from fiscal to calendar year)**

Additional details are provided in the comprehensive Performance Management Workgroup Report including a tentative timeline for implementation (this will need to be revised). A communication and change management plan will be developed with the approval of these recommendations. In addition, the content for the UW-LEaD Professional Development Series pilot for People Managers and Organizational Contributors included topics recommended by the Performance Management Workgroup.



Shifting the Focus Performance Appraisal to Performance Management



- Review goals and performance standards with employee
- Formalize feedback to employee on his or her work performance
- Identify training or development needed to improve performance; and
- to prepare for anticipated changes in the unit
- Increase or maintain expected levels of productivity

- Accomplishes goals of organization
- Strengthens communication/ collaboration across the institution
- Deepens employee engagement, retention & creates sense of accomplishment
- Clarifies performance expectations
- Offers discussion of learning and professional development opportunities



Performance Management Cycle

A Proposed Framework for Managing Performance



Best Practices in Performance Management

Society for Human Resources Management (2017); Success Factors (2017)

- Performance management = holistic process
- Continuous communication, feedback and coaching – no surprises at annual review
- Interim or mid-cycle reviews
- 360 Feedback Framework (formative, above, below and across)
- Paperless appraisals & performance management technology
- Goal alignment between employee's work and organizational goals



Operational
Excellence

Organizational Goal Alignment

Goals are SMART and Aligned at Every Level

