

# Managing Performance and Development



## **Delgado Community College** **LEADING THE WAY** **Leadership Series**

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Before We Begin...

# Objectives

**By the end of this module, you will be able to:**

- **Explain what Performance Management means at Delgado and why it is so important.**
- **Describe how to structure a Performance Review**
- **Identify the steps in each stage and explain their importance**
- **Review Performance Evaluations and Planning**
- **Review Timeline**
- **Review Job Descriptions – including Physical Demands and Employee Signature**

# Two Types of Performance Feedback

- **Informal**

- Along-the-way progress reports provided for specific performance.



- **Formal**

- An established period of time dedicated to discussing all aspects of the employee's performance and a final rating.
- This should really be a CONFIRMATION of the informal, along-the-way feedback that has occurred since the last formal session.
- There should be NO UNPLEASANT SURPRISES for an employee concerning their job performance at this point.

# Development Cycle

## Stages in the Review Process

Follow-up

Preparation

Performance and  
Development Review

# Preparation

## **Set time, date, and venue**

- Allow sufficient time to prepare for and conduct the review
- Choose a neutral and quiet place

## **Advise Employee**

- Agree upon a mutually convenient time and date for the review
- Clarify the purpose of the review
- Ask the employee to think about their performance, future plans, and goals
- Give them a self-assessment form and ask them to complete it prior to the review.

## **Study the employee file and notes**

- Achievement over the past year
- Weak areas or areas of concern
- Review last performance review

## **Study Job Description & KPOs (Key Performance Objectives)**

- Has job description changed?
- How does the employee performance compared with the job description?
- How well has the employee performed against KPOs?

## **Prepare Notes and a Written Agenda**

- Compile your notes and complete a draft of the Performance Review
- Consider specific examples of behaviors
- Consider feedback received regarding employee's performance
- Script how you want the meeting to go

# Constructing an Agenda

- List all of the performance-related topics and prepare questions for each.
- Note behavior patterns you want to continue to *encourage*.
- Note behavior patterns you wish to *change*.
- Consider possible areas of conflict or problem areas - where you expect push-back, and come up with proactive ways to deal with such areas.

# Feedback Guidelines

- Remember that Feedback is about BEHAVIOR—not personality!
  - Should communicate what the employee has done, has not done, or needs to do in the future.
  - Feedback is NOT the supervisor's attitude about the employee, nor is it *guesswork* about the employee's performance.
- Feedback is about observations (factual data)—not assumptions.
  - Feedback offers a description, rather than a judgment.



# Feedback Guidelines (cont'd)

- Feedback is a clear message about the performance topics discussed.
  - Balance the amount of information that the employee can use against the amount of information you might *like* to give.
  - Recognize that feedback is most valuable when it is valid performance information for the employee, because with such information the employee is now **ACCOUNTABLE** for his/her future performance: what to continue doing, what to stop doing, and what to modify.
- Feedback is given at an appropriate time and in an appropriate place for confidential information to be shared.

# Implementation of Performance Review

## 4 Steps to Success:

1. Put the employee at ease
2. Review the employee's accomplishments and areas for improvement
3. Agree on a Personal Development Plan
4. Close the Review



# Quick Tips

- Silence Your Cellphone, Desk Phone, and Email Alerts
- Do Not Put Barriers Between You
- Open Posture
- Active Listening Techniques
- Make Eye Contact
- Remember, this is a conversation...NOT a monologue!
- Reminder: If it is not documented, it did NOT happen

# Plan Your Follow-Up

Short Term



Long Term




# Performance Management Forms

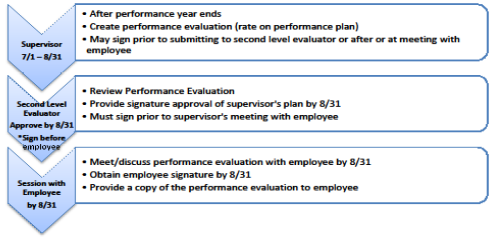
Classified Staff

Unclassified Staff

# Classified Staff Performance Timeline and Form


**LOUISIANA**  
**SCS**  
 State Civil Service

**JOB AIDS AND RESOURCES**  
**Performance Evaluation System – Evaluation Process**



## Employee Information

	Employee Personnel #: _____
	Performance Year: _____
	Evaluation Period: _____

## Initial Planning Session

### Step #1 - Evaluating Supervisor (SCS Rule 10.2):

	Date Given to Second Level Evaluator: _____
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### Step #2 - Second Level Evaluator (SCS Rule 10.3):

	Date Approved <i>(Must be on or before planning session)</i> : _____
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### Step #3 - Employee:

	Date: _____
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By signing this form, I am certifying that my evaluating supervisor conducted a planning session with me on the date shown.

### Updated Planning Sessions (Optional):

		Supervisor Initial: _____		Employee Initial: _____	
		Supervisor Initial: _____		Employee Initial: _____	
		Supervisor Initial: _____		Employee Initial: _____	

### Agency Human Resources Office Use Only (Optional)

	Human Resources Staff Initial: _____		Evaluating Supervisor Compliance (Y/N) _____		Second Level Evaluator Compliance (Y/N) _____
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# Unclassified Staff Performance and Form

## LOUISIANA COMMUNITY AND TECHNICAL COLLEGE SYSTEM PROFESSIONAL/ADMINISTRATIVE EVALUATION AND PLANNING FORM FOR UNCLASSIFIED EMPLOYEES

Name

Position

Period Covered from  to

Department

Full Time  Part Time  (%FTE)

Reason for Rating:  Annual  Other  Hire Date

### INSTRUCTIONS:

**% of effort** - For each Section indicate the % of the employee's overall effort that is assigned for all applicable criterion covered by the section. Note that the total % of effort for all sections combined should equal 100%.

**Criterion Comments** - In the space provided for criterion comments, please provide a brief narrative summary of the employee's activities during the period covered. These comments should justify the criterion rating as indicated. Utilize any goals and objectives that may have been set for this criterion in the previous evaluation period.

**Criterion and Section Summary Rating** - Rate the employee on each applicable criterion in each section. Add the criterion rating numbers together and divide by the total number of criteria in each section to obtain the Section Summary Rating.

**Overall Evaluation Rating** - In the overall evaluation summary, provide a narrative statement that supports the overall evaluation rating for the employee for the period evaluated, as supported by the ratings for each Section and their respected % of effort assigned.

Transfer the corresponding Section Summary Rating into the Overall Evaluation Rating Calculator then multiply by the % of effort assigned to the Section to determine the Weighted Rating. Total the Weighted Rating for all sections to determine the Overall Evaluation Rating.

**Planning Form** - Utilize the Planning Form to set goals and objectives for each section for the next evaluation period.

**Performance Improvement Plan** - A Performance Improvement Plan is required for all employees with overall evaluation ratings of Needs Improvement or Unsatisfactory. This is not required for other overall evaluation ratings.

**Individual Rating** - The intent of this evaluation process is to rate the individual on his/her own performance based on objectives, goals, expectations and actual performance. It is not intended to be a ranking of one employee against another.

**Return pages 3 through 8, Planning Form and Performance Improvement Plan, if applicable, to human resources.**





# Four Step Personal Development Plan Process

## 1. **My Target**

- ✓ “What I am going to focus my development on?”

## 2. **What will success look like?**

- ✓ This step in the process is for the employee to document what success will look like when they achieve their development goals. The employee should make these very specific so anyone that reviews the form would be able to say whether the employee successfully developed in the area.

## 3. **What action(s) will be taken?**

- ✓ List specific actions that will taken to ensure they achieve their goals.

## 4. **Keeping on track**

- ✓ List milestones with due dates to ensure that goals are being reached.

# GOAL SETTING

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S

SPECIFIC

M

MEASURABLE

A

ATTAINABLE

R

RELEVANT

T

TIME-BOUND

# Dates to Remember


- **Unclassified**

- All Annual reviews due by **6/30/2018**
- Be sure to include a Current (*Revised*) Job Description

- **Classified**

- All Annual reviews must be completed between **7/1/2017- 8/16/2018**
- Planning Sessions **FY 18/19 7/1/2017 – 09/30/2018**

Date	Event
July 1 - September 30	PES Planning period
July 1 - August 31	PES Evaluation period for completed performance year
September 15	PES Request for Agency Review deadline to HR for performance evaluation
October 15	Agency Reviewer deadline to render decision
10 days from Agency Decision	PES Request for SCS Director Review deadline for performance evaluation
30 days after PES file receipt	SCS Director deadline to render decision



Questions?

T H A N K

Y O U