Welcome!

Performance Management in OHR

Your presenters today

Amanda Wolford
Consultant

Rosie Barry
Manager

Brandon Sullivan
Director
Q&A Panelist
Q&A

Use the Q&A on the right to enter your question.

We’ll answer what we can now, the rest will be added to the course Q&A.
Poll Question

Which of the following describes your CURRENT experience with performance management? (select all that apply):

A. It’s more frustrating and time consuming than productive and helpful.
B. It’s an administrative exercise that isn’t directly tied to the day-to-day work.
C. It consists primarily of listening to what I did wrong.
D. It’s generally a productive, helpful process, but it doesn’t really make a difference.
E. I love it! It motivates me.
Traditional Performance Management

Goals

Evaluation

One Year

Leadership and Talent Development
Traditional Performance Management

- Help develop and grow
- Improve communication
- Align work to achieve goals
- Help perform to the highest potential
Traditional vs Effective

Goals

Evaluation

Ongoing Check-Ins
OHR Performance Management

Kicking off a new process - regular conversations about:

- Goals
- Successes
- Development needs
How did this come about?

Supervisory Development Course: Managing and Evaluating Performance + OHR Context
Effective Performance Management

Goals

Goal Setting template available at z.umn.edu/ohrpm
Effective Performance Management

Goals

Ongoing Check-Ins
Effective Performance Management

Goals

Ongoing Check-Ins

Evaluation
How will this work for me?

Tools:
- SDC site
- Monthly emails
- All OHR staff meetings
- OHR News
Q&A

Use the Q&A on the right to enter your question.

What is on your mind?
How can we best support and help you?
Ongoing Check-Ins

Discuss Goals
Provide Coaching
Evaluate Progress
Ongoing Check-Ins

Simple Conversations

Goals

Evaluation
Ongoing Check-Ins

Simple Conversations
Key to Learning and Improvement

Goals

Evaluation
Ongoing Check-Ins
Discuss Roles and Responsibilities

OHR Ongoing Check-In Template

This is an optional template for supervisors and direct reports to help structure ongoing check-in discussions by revisiting goals, discussing progress, and giving and receiving feedback. Ideally the employee should fill it out prior to his/her next check-in.

Employee Name: Date:

1. ROLES AND RESPONSIBILITIES

Consider what is needed from the supervisor:
- Communicate vision and strategy and clarify your role in the big picture
- Provide clear expectations for results (the what) and behaviors (the how)
- Define what success looks like
- Provide feedback and coaching around goals and expectations

Consider what is needed from the employee:
- Ask questions
- Be proactive when work seems misaligned with broader goals
- Seek, accept, and act on feedback
- Take ownership for own career and development – set goals, seek opportunities, ask for guidance when needed

2. REVIEW BROAD AND/OR SHORT-TERM GOALS

1.

Check-In template available at z.umn.edu/ohrpm
# Ongoing Check-Ins

**Discuss Roles and Responsibilities**

<table>
<thead>
<tr>
<th>Supervisor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communicate vision and strategy</td>
</tr>
<tr>
<td>Clarify roles</td>
</tr>
<tr>
<td>Provide clear expectations</td>
</tr>
<tr>
<td>Define what success looks like</td>
</tr>
<tr>
<td>Follow up</td>
</tr>
</tbody>
</table>
Ongoing Check-Ins

Discuss Roles and Responsibilities

**Supervisor**
- Communicate vision and strategy
- Clarify roles
- Provide clear expectations
- Define what success looks like
- Follow up

**Employee**
- Take ownership over development
- Ask questions
- Be proactive
- Seek and act on feedback

Leadership and Talent Development
Ongoing Check-Ins

Coaching

Self Awareness ➔ Motivation ➔ Application ➔ Accountability

New Skill Development ➔ Practice Opportunities ➔ Assessment ➔ Ongoing Feedback & Support ➔ Reflection

Leadership and Talent Development
Ongoing Check-Ins

Conversation Example
Ongoing Check-Ins

Conversation Example

✓ Touched on goals
✓ Evaluated progress
✓ Provided coaching
✓ Discussed ways to develop
Formal Evaluation

Summary, not a Surprise

Progress Check-Ins

Review
OHR Performance Management page

Performance Management in OHR

“The key to effective performance management is having ongoing discussions with your supervisor about your successes, areas where you may need some help and coaching, and progress on your goals. The important thing is to regularly talk with one another about your work. We are excited to launch this new approach that is based on the latest research in effective performance management.”

Kathy Brown, Vice President, Office of Human Resources

The new Performance Management process in OHR is based on Module 2: Managing and Evaluating Performance, right here in the Supervisory Development course. If you navigate to Module 2, you can explore videos, quick guides, practice scenarios, and other resources that outline our model for setting goals and having more frequent performance discussions. You can watch the webinar, read questions and answers from webinar participants, and explore best practices identified in trade and academic journals, too.

Quick Links
Process Overview

Templates and Downloads
OHR Goal Setting template
OHR Check-in template
Next Steps

• Talk to your supervisor/teams about what you heard today
• Start/continue your check-ins anytime!

Coming Soon:

• Sept 14, 8:30-10:00 - next OHR all staff meeting
• First monthly email with topic at the beginning of October
• Topics include: potential and readiness, employee engagement, career development, values and motivation, and much more.
Q & A

What is on your mind?
How can we best support and help you?
What do you still need to know that you haven’t heard today?

The webinar recording will be available by the end of the week
You will receive an email with a link