Performance Management
Breakout Session
Agenda

- Performance Management
- Policy Features and Benefits
- Roles and Responsibilities
- Campus Engagement
- Q & A
What is Performance Management?

- Performance Management is...
  - an ongoing process where supervisors and employees work together to plan, monitor, and review an employee’s work objectives, goals, and professional development.
  - comprised of frequent informal conversations including coaching, feedback and support to employees about their work, needs and accomplishments related to the duties and expectations of their positions.
The Performance Management Policy

- Supervisors must conduct at least four performance management activities with employees:
  1. Expectations and goal-setting conversations
  2. Informal conversations
  3. Mid-point conversation
  4. Summary evaluation

- The goal setting, mid-point, and summary evaluation conversations must be documented.
Policy Features and Benefits

Policy features:

- **Flexibility** for schools and departments to design and implement their own programs that satisfy the policy requirements
- **Support** given by central human resources with training, resources, tools and consultations

A few of the benefits to employees:

- Through regular feedback, managers and supervisors are aware and able to identify high-quality work within a formalized process
- Clarifies expectations in addressing performance issues and identifying developmental needs
- Through a performance management process that allows regular interaction, supervisors and managers are better able to determine a professional development plan to further employee success
- Promotes job satisfaction
Who Does It Affect?

- Full-time permanent University (Classified) and Academic Staff employees
- Part-time permanent University (Classified) and Academic Staff employees
- Faculty who supervise University (Classified) and Academic Staff employees
- University (Classified) project employees with positions lasting one year or more
- Unclassified limited employees
## Campus Engagement

A few of the recent ways in which campus feedback has been gathered...

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<td>Performance Management Best Practices and Tools Focus Group</td>
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<td>Managers and supervisors</td>
<td>Performance Management Policy Forum</td>
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<td>Shared governance</td>
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What We Learned

A small sampling of the suggested tools and resources:

• Mentorship program
• Templates for recording and tracking the conversations
• Training for supervisors, including soft skills-building, effective communication with employees
• Examples of good forms already in use on campus
• Trainings for employees on the policy (not just for managers and supervisors)
• In-person informational sessions on the policy
• Self-evaluation forms, in which an employee reflects upon the goals and projects of the previous year
• Ensure all have access to their position descriptions
• Online resources where one can learn more on the policy
Upcoming Event

HR Design Webinar
The Performance Management Policy: What You Need to Know
Thursday, March 19, noon – 1 pm

- Learn about the policy requirements, roles and responsibilities •
- Understand what training and resources are available to you •
  - Ask questions • Receive helpful answers •

Find details at hrdesign.wisc.edu under “Events”
Audience Q & A
Thank You!