myPerformance Form Preview Session

Human Resources
Missouri S & T
Agenda

• Background

• We will review the following form sections:
  1. Key Responsibilities
  2. Success Factors
  3. Next year’s Performance Goals
  4. Development Plan

• Scoring

• Wrap up
Welcome & Introductions

myPerformance Implementation Team
myPerformance Implementation

• HR is excited to offer you new tools and resources to help you get more out of your annual performance appraisal!

The rollout of myPerformance includes:
• A new online performance appraisal tool
• Training
  – Performance management training
  – How to use the tool
• Standardized forms and processes
Units / Employees Included in 2015

- Approx. 225 employees
- At least 2,500 employees
- Approx. 900 employees

Full-time, benefit-eligible staff only
Process of Creating the New Form

• Reviewed forms used within UM System
• Reviewed best practices
• Drafted form
• Facilitated consensus with HR leaders on all campuses
• Loaded form into the new software tool
## Appraisal Form

### What Will Be Included in the Overall Score?

<table>
<thead>
<tr>
<th></th>
<th>Employee GGS levels 1-10</th>
<th>Leader GGS levels 11 and up</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performance Goals</td>
<td>X</td>
<td>X*</td>
</tr>
<tr>
<td>Key Responsibilities</td>
<td>X</td>
<td>X*</td>
</tr>
<tr>
<td>Success Factors</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Leadership Competencies</td>
<td></td>
<td>X</td>
</tr>
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All forms will have the following unscored sections:
1. Previous Development Plans
2. Establish New Performance Goals
3. Establish New Development Plans
4. Employee and Supervisor Final Comments
5. Completion of Compliance Training
6. Support for Culture of Health (Leader form)
The Employee Form
GGS Levels 1-10

Key Responsibilities: The “What”
- Fill in the blank
- 50% of overall score

Success Factors: The “How”
- 50% of overall score
The Leader Form
GGS Levels 11 and up

Key Responsibilities/Performance Goals: The “What”
The “Results”

- Fill in the blank OR pulled from Goals sub tab
- 50% of overall score

Success Factors & Leadership Competencies: The “How”

- 50% of overall score
Section 1: Key Responsibilities

• **What** you do in your job

• **Fill-in-the-blank**
  
  • You and your manager will determine your top 3-7 functions before your performance appraisal
  
  • We will provide you with resources to complete this task
### Key Responsibilities

**Key Responsibility 1**

<table>
<thead>
<tr>
<th>Manager</th>
<th>Self</th>
</tr>
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<tbody>
<tr>
<td><img src="image1" alt="Outstanding" /></td>
<td><img src="image2" alt="Outstanding" /></td>
</tr>
<tr>
<td><img src="image3" alt="Exceeds Expectations" /></td>
<td><img src="image4" alt="Exceeds Expectations" /></td>
</tr>
<tr>
<td><img src="image5" alt="Successful" /></td>
<td><img src="image6" alt="Successful" /></td>
</tr>
<tr>
<td><img src="image7" alt="Improvement Expected" /></td>
<td><img src="image8" alt="Improvement Expected" /></td>
</tr>
<tr>
<td><img src="image9" alt="Unacceptable" /></td>
<td><img src="image10" alt="Unacceptable" /></td>
</tr>
</tbody>
</table>

**Self: N/A**

**Comments:**

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**Screenshot of One Key Responsibility**
Section 2: Success Factors

• **How** you do your job
• Seven Success Factors have been identified as important to all employees system-wide:
  1. Accountability
  2. Collaboration
  3. Communication
  4. Customer Focus
  5. Judgment
  6. Quality
  7. Time Management

• Additional Success Factors identified for leaders (as defined by ALDP)
  1. Performance driven
  2. People centered
  3. Culturally competent
  4. Values oriented
  5. Integrative and strategic leader
Success Factor Example: Accountability

• Maintains an acceptable attendance record and is punctual
• Takes ownership of tasks and assignments
• Follows through on commitments
• Reliably produces results with little need for oversight
### Success Factors

**Accountability**

- Maintains an acceptable attendance record and is punctual
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**Self: N/A**

**Comments:**

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**Screenshot of One Success Factor: Accountability**
Section 3: Performance Goals

• Short-term objectives specific to your work

• Set 1-5 goals to be tracked throughout the year
  • These will be included in the performance appraisal ratings for 2016

• Performance goals will not be rated this year
Screenshot of One Performance Goal
Section 4: Development Plans

• Short-term objectives related to your professional growth and advancement

• Set 1-5 goals to track throughout the year

• This section will not be rated
Add Development Plan

Employee: Anitra Rivera
Title: 
Description/Metric: 

Entered By: Anitra Rivera
Related Competency: N/A

General Timeline: 
Completed Date: 
Send me a reminder 7 day(s) before the due date.
Then every 7 day(s).

Status: Not Started
Last Modified: 1/27/15

Notes

Screenshot of One Development Plan
Scoring: The Rating Scale

- Outstanding
- Exceeds Expectations
- Successful
- Improvement Expected
- Unacceptable
Scale Example: Successful

• Performance **consistently achieves** performance goals, key responsibilities, and Success Factors
• **Requires minimal supervision** and complies with work rules and regulatory requirements
• Performance **consistently meets** the demands placed upon the position
• **Reliably completes** routine assignments in an **accurate and timely** fashion
• **Assumes additional responsibilities** when requested or assists in extra project work
• **Meets the University’s high performance standards**
• **Contributes positively** to the success of the work group and organization
Calibration

• Training on the scale definitions
• Reviews by 2\textsuperscript{nd} level managers
• Reports after appraisals are completed
Appraisal Form Completion Process

Now-March
- Employees and managers meet to discuss key responsibilities/goals

4/17
- Employee writes his/her self appraisal (strongly encouraged)

5/15
- Manager writes appraisal for each employee

5/29
- Manager’s manager approves appraisal

6/19
- Manager discusses and finalizes appraisal with employee

6/26
- Employee and manager sign off

Process opens April 1
Process closes June 30
What’s Next?

• Training will be offered for both employees and supervisors on:
  • Getting the most out of performance appraisals
  • Using myPerformance
  • Covering all aspects of the performance review cycle
    • Comprehensive
    • Online
    • interactive
What Questions Do You Have?