Performance Management

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Agenda

• Careers Overview
• Where are we?
• Working Group Results
• Institutional Decisions versus Global Configuration
• Next Steps
What you will see here today is part of the Careers initiative of OneUSG Connect. Availability of these new features will be determined based on a schedule determined by readiness. Institutions will be contacted within the next few weeks to determine your readiness as we move forward. Shortly after institutions confirm their ability to participate in the implementation phase, the schedule will be confirmed.
Careers Overview

Recruitment
Applicant Tracking System/Job Offer Management

Profile Management
Job Description Repository

Onboarding
I-9 Management/Hire Packets

ePerformance - Pilot In-Process
Annual Performance Reviews/Provisional Evaluations

Manager Self-Service
Personnel Actions/Delegation
OneUSG Careers - ePerformance

• ePerformance is a self-service performance evaluation management tool

• The module will foster a collaborative performance management process for managers and their employees

Next Due Date 11/20/2019
Performance Management Fundamentals
Performance Management

• Performance management focuses on alignment and feedback.

• It is a collaborative ongoing dialog between supervisor and employee to understand and facilitate achieving:
  – Organization/unit needs for performance and results
  – Alignment to institutional goals, objectives and priorities
  – Individual expectations
  – Continuous feedback

• When properly done, enhances employee satisfaction and engagement
Performance Differentiation

- Objectively measure performance
- Allows managers to identify and potentially reward top performers
- Requires honest, open feedback
- Provides managers with tools to improve performance
- If done well, improves employee engagement
BOR REQUIREMENT:
Supervisors are required to assess and ensure optimal employee performance, document acceptable and unacceptable performance, and to improve performance that is below standards or below and employee’s capabilities”.

STATE OF GEORGIA STIPULATIONS:
Requires merit allocations should align with and support the employee’s evaluation ratings awarded.
Across the board and cost of living increases are not to be
ePerformance Working Group
Working Group Members
Where are we?
ePerformance Pilot Schedule

- Finalize Scope - 7/16/19
- Development Complete - 7/23/19
- Test Scripts Complete - 7/26/19
- Institutional Deliverables Due to USG – 7/29/19
- System Test - 7/30 & 7/31
- Job Aids Completed - 8/12/19
- UAT Test - 8/15/19 - 8/16/19 - Athens
- QA Testing - 8/19-21/2019
- Apply to production – 8/23/2019
- Begin Pilot – 10/01/2019
Performance Evaluation Settings

• Goals
• Job Duties
• Performance Factors
• Leadership Factors
• USG Core Values
• Institutional Values
## Performance Templates

<table>
<thead>
<tr>
<th>Evaluation Type</th>
<th>Define Criteria</th>
<th>Leadership Factors</th>
<th>Checkpoint</th>
<th>Participant Evaluations</th>
<th>Self Evaluation</th>
<th>Manager Evaluation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Leadership</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<tr>
<td>Annual Staff</td>
<td>X</td>
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<tr>
<td>Provisional Leadership</td>
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<tr>
<td>Provisional Staff</td>
<td>X</td>
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</table>
Rating Scales

- All items will be rated on a five point scale

<table>
<thead>
<tr>
<th>Goals Rating Scale</th>
<th>Performance Factor/Value Rating Scale</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 - Exemplary</td>
<td>5 - Exemplary</td>
</tr>
<tr>
<td>4 - Superior</td>
<td>4 - Superior</td>
</tr>
<tr>
<td>3 - Successful</td>
<td>3 - Successful</td>
</tr>
<tr>
<td>2 - Partially Successful</td>
<td>2 - Emerging</td>
</tr>
<tr>
<td>1 - Not Successful</td>
<td>1 - Not Successful</td>
</tr>
<tr>
<td>Core Performance Factors</td>
<td>Leadership Factors</td>
</tr>
<tr>
<td>------------------------------------------</td>
<td>----------------------------------------------</td>
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<tr>
<td>Communication</td>
<td>Organizational Development</td>
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<tr>
<td>Customer Service</td>
<td>Fiscal/Budget Management</td>
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<tr>
<td>Initiative</td>
<td>Strategic Planning</td>
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<tr>
<td>Innovation</td>
<td></td>
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<td>Job Knowledge</td>
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<td>Policies</td>
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<td>Quality of Work</td>
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<td>Interpersonal Relationships</td>
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<td>Reliability/Attendance</td>
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<tr>
<td>Critical Thinking</td>
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Notifications

Managers and Employees will receive notifications when the following actions occur:

- Employee assigning a performance document
- Employees add evaluative criteria
- Manager finalizes evaluative criteria
- Due Date Reminders
- Employee Completed Self Evaluation
- Manager Requests Employee Acknowledgement of documents
Reporting and Metrics
ePerformance Review Process

For discussion purposes, we will display a January through December review cycle. Institutions will retain their autonomy in determining the review periods.
<table>
<thead>
<tr>
<th>ePERF01 - ePerformance Overview</th>
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</thead>
<tbody>
<tr>
<td><strong>January – March</strong></td>
</tr>
<tr>
<td><strong>Administrator</strong></td>
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<td></td>
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<tr>
<td><strong>Manager</strong></td>
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<td></td>
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<tr>
<td><strong>Participant</strong></td>
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<tr>
<td></td>
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<tr>
<td><strong>Employee</strong></td>
</tr>
</tbody>
</table>

- **Administrator**:
  - Create Documents
  - Define Evaluative Criteria
  - Track Progress

- **Manager**:
  - Define Evaluative Criteria
  - Track Progress
  - Finalize Evaluative Criteria
  - Nominate Participants
  - Complete Manager Evaluation

- **Participant**:
  - Complete Participant Evaluation

- **Employee**:
  - Complete Self Evaluation
  - Define Evaluative Criteria

<table>
<thead>
<tr>
<th></th>
<th>Define Criteria</th>
<th>Managers and employees will collaborate to determine the evaluative criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Checkpoint</td>
<td>Throughout the performance cycle, managers will meet with employees to review their performance and update the evaluative criteria if necessary. For example, if an employee has made significant progress on a goal, managers may notate their progress in OneUSG.</td>
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<tr>
<td>3</td>
<td>Participant Evaluation</td>
<td>Managers may nominate other institutional employees to participate in the evaluation process for this employee. This may be used in situation where employees report to multiple supervisors.</td>
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<tr>
<td>4</td>
<td>Self-Evaluation</td>
<td>Employees will complete a self evaluation to provide managers with feedback on their performance over the evaluation period.</td>
</tr>
<tr>
<td>5</td>
<td>Manager Evaluation</td>
<td>Managers will complete the annual evaluation of the employee.</td>
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</tbody>
</table>
Demonstration

We will demonstrate the system functionality, from creation of ePerformance documents to the completion of manager evaluations.
Institutional Readiness

• Configure ePerformance Templates (Workbook)
  • What types of templates will be needed for your institution?
  • Will you need a separate performance template for leaders?
  • Will manager evaluations need to route upwards for acknowledgement?
  • Define Institutional Performance Factors

• Practitioner Security Assignments
  • Who will need practitioner access?
QUESTIONS