

# Performance Management in GMS



*GEORGETOWN UNIVERSITY*

# Performance Management

Performance Management is the continuous process of identifying, measuring and developing employee performance.

The process is designed to facilitate manager and employee discussions around expectations and performance, acknowledge achievements, identify areas for improvement and plan for future development.

# Performance Management Objectives

- Foster a culture of employee engagement, feedback, accountability, and performance excellence
- Create an environment in which managers and employees can regularly communicate about departmental and individual goals and accomplishments

# Employee Responsibilities

- Consistently perform assigned responsibilities and contribute to the department's goals and business objectives
- Take an active role in developing and achieving individual performance goals
- Consistently demonstrate good conduct, including attendance, ethical use of work time and University resources
- Take reasonable care for their own health and safety as well as the health and safety of others

# Manager Responsibilities

- Provide honest, clear and concise expectations of an employee's responsibilities
- Provide on-going guidance and feedback
- Work with employees to develop individual goals that support the department's mission
- Consistently and fairly enforce policy and procedure
- Maintain a safe and productive work environment

# WHAT'S HAPPENING?

On March 1, Performance Management will be live in GMS as a Business Process!

As a result, there are changes to discuss.

# What are the Benefits for Employees?

- Standardize Performance Management Processes and Systems
- The Evaluation is easy to complete, route and retain.
- Real Time Tracking of Goals
  - Easily access performance goals and manager feedback with on-demand dashboards!
- Professional Development Tools

# What are the Benefits for Managers?

- Standardized performance management processes and systems
- Ensure compliance with performance management requirements and accountability
- Provide on-demand performance metrics and insights for leadership via reporting and dashboards
- Track team member progress in achieving goals set throughout the year



# What isn't changing?

- HR Policies regarding Performance
  - **None of these have changed!**
  - The [Human Resources Policy Manual](#) has all the information you need regarding Employee Performance.
- The Performance Evaluation Process
- The Participants
  - Administrative Employees and their Managers will continue to participate in the Performance Management Process

## Performance Evaluation Participants

- Regular and Term Administrative employees hired prior to February 28, 2019, who have successfully completed any applicable probationary period.
- The Managers of these Employees
- The Manager's Managers of these Employees

## Performance Evaluation Review Period

April 1, 2018 through February 28, 2019

# Performance Evaluation Workflow in GMS



# Suggested Deadlines

1

**Employee: Completes Self Evaluation**

**Deadline: 3/22/19**

2

**Manager: Reviews Employee's Self-Evaluation and performs Manager Evaluation**

**Deadline: 4/19/19**

3

**Manager's Manager: Reviews Employee's Self-Evaluation and Manager's Evaluation**

**Deadline: 5/1/19**

# Performance Evaluation Participants

Research Center for Political Studies



**Georgette Healy: Center Director  
(Manager's Manager)**



**Helen Saxa: Senior Policy Analyst  
(Manager)**



**Jane Hoya: Program Coordinator  
(Employee)**

# Jane Hoya's Job Responsibilities



**Administration - 30%**

**Events – 30%**

**Fiscal Assistance - 10%**

**Research – 30%**

## **Events**

- Handle booking (rooms and restaurants) and catering arrangements for receptions, lectures, roundtables
- Serve as primary initiator of communications and marketing strategy reaching various audiences: students, faculty, community members

# The Performance Review (Self Evaluation)



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# Elements of the Performance Review

Competencies



Goals Assessment

Accomplishments

Overall

Professional Development



# Competency

A set of defined behaviors, knowledge, skills, and abilities required for effective performance.

For your Performance Review,  
**evaluate yourself on the following  
competencies for this review period.**

# Competencies

**Functional Knowledge**

**Work Quality**

**Professionalism and  
Inclusion**

**Service and  
Dependability**

**Initiative**

**Communication and  
Collaboration**

**Managing Others  
(Managers only)**

Full definitions are listed in the business process itself.

The order listed on the screen is the same order you will see it in GMS in the Competencies section.

# Ratings

1

**Unsatisfactory**

2

**Needs  
Improvement**

3

**Meets  
Expectations**

4

**Exceeds  
Expectations**

5

**Exceptional**

We use a 5 point rating scale to assign a level of performance to each of these competencies.

The order listed on the screen is the same order you will see it in GMS in the drop-down menu.

# Goals Assessment

**Copy and Paste Goals  
from your previous Review Period.**

If you did not have Goals from the previous Review Period for any reason, skip this section.  
**Further, your review will not be negatively affected due to the absence of goals.**

Not  
Required

# Accomplishments

**List any achievements above and beyond your job requirements and goals for the performance review period.**

- Can relate to your competencies, job responsibilities, or goals.
- The Comments section should be used to highlight the unique nature of the accomplishment or the positive impact it had on the organization.



Not  
Required

# Overall

## **Input your Summary rating for the year.**

- Does not have to be an average of the competency ratings, but must be consistent
- Take the following into account when rating your overall performance?
  - Relative significance of competencies and goals  
*(Which ones are most critical to success in your position?)*
  - Use comments to explain your rating

# Professional Development

**Describe the means by which you believe you can develop your professional skills in the coming year.**

- Mark as many types of development activities as you like
- Use the comments to be specific about what you've included



Not  
Required

# DEMONSTRATION!

Please watch while your instructor demonstrates:

## Employee Annual Performance Review (Self-Evaluation) Process

1. We will launch the Employee's Annual Performance review and complete the following:
  - Competencies
  - Goals
  - Accomplishments
  - Overall
  - Professional Development
  - Summary



# Manager Evaluation of the Employee's Annual Performance Review



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# Deadlines



1

**Employee: Completes Self Evaluation**

**Deadline: 3/22/19**

2

**Manager: Reviews Employee's Self-Evaluation and performs Manager Evaluation**

**Deadline: 4/19/19**

3

**Manager's Manager: Reviews Employee's Self-Evaluation and Manager's Evaluation**

**Deadline: 5/1/19**

# Manager Evaluation Objectives

- Read and interpret the Employee's Self Evaluation
  - If more clarification is required for a rating or goal, select Send Back
- Perform the Manager's Evaluation of the Employee
  - If you disagree with the Employee's rating of a competency or their Overall rating, that's ok: input relevant comments

# Evaluating an Employee

## Overall Ratings

- Summary rating total performance for the year
- Must be consistent with competency ratings
- Comments required for all overall ratings
- Specific examples required if Overall rating is (1), (2) or (5)

# Feedback

## **Recognize**

- Giving and receiving feedback is essential to creating a culture of collaboration, engagement, and success
- Giving and receiving feedback can be an uncomfortable situation

## **Be Direct, Be Kind**

- Offer an opportunity for growth, include specific examples of behavior

## **Do Not Make it Personal**

- Imagined slights and malice are toxic

# Feedback

## **Listen**

- Managers and employees must understand the situation together in order to make positive change
- Allow moments of silence to come into the conversation

## **Show Up, Be Present**

- Stay engaged and maintain focus

## **Inspire Greatness**

- Respectful, direct feedback can restore the individual and the team

# STAR Feedback Model

## Situation

Use precise terms to answer the following:

- When did the event occur?
- Where were you?
- Who was involved?

## Task

Explain the task undertaken:

- What was expected?
- By whom?

## Action Taken

Observed behavior:

- Did the behavior meet expectations?
- Why? Or why not?

## Result

What was the impact on others?

- What was the impact to the organization?
- What do you expect going forward?

“The registration for our upcoming student symposium was low. Steve spent extra time updating our communication materials and reaching out to potential registrants resulting in higher attendance. Great work, Steve!”

“After securing interest with potential new grant funders, Morgan did not adequately prepare for their first meeting, and now the funding is in jeopardy. We need Morgan to do a run through of the presentation with us in advance of our next meeting to be sure she is prepared.”

# DEMONSTRATION!

Please watch while your instructor demonstrates:

## Performance Management Approval: Manager

2. Review and rate each component of the Employee's Annual Performance Review in GMS including:
  - Competencies
  - Goals
  - Accomplishments
  - Overall
  - Professional Development
  - Summary



# Deadlines



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# Manager's Manager Evaluation Objectives

- Review the Employee Self Evaluation and the Manager's Evaluation
  - Has the Manager adequately evaluated the Employee? Are there comments to justify ratings? Is the overall rating consistent with conversations regarding the Employee throughout the review period?

# DEMONSTRATION!

Please watch while your instructor demonstrates:

## Performance Management Approvals

### 3. Manager's Manager Review and Approval

**Manager/Employee:** Performance Meeting (non-GMS)

### 4. Manager Acknowledgement\*

**IMPORTANT NOTE!** Once the Manager clicks the Manager Acknowledgment, the Manager's ratings of the Employee will be visible in GMS to the Employee.

### 5. Employee Acknowledgement

# CREATING “SMART” GOALS

# Why do we create goals?

- Allow employees and managers to establish clear expectations at the beginning of the performance evaluation period
- Create a context and a structure for having an ongoing dialogue about work performance and achievements

# SMART Goals

## Specific

- Use precise terms to answer:
  - What will be done?
  - Why? Where? How?

## Measurable

- How much?
- How many?
- What is the number, percent, and/or ratio?

## Attainable

- No? Why not?

## Relevant

- How does it impact the organization?
- How does this goal fit into the organization's larger goals?

## Time-Bound

- When is it due?
- When should the goal be accomplished?

# Jane Hoya's Job Responsibilities



**Administration - 30%**

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**Research – 30%**

## **Events**

- Serve as primary initiator of communications and marketing strategy reaching various audiences: students, faculty, community members

## **Jane Hoya's Goals**

### **Goal**

- Communicate announcements regularly with members of the community.

### **SMART Goal**

- Produce and issue weekly newsletters to all students, staff and faculty every Monday via email, and update the News section of the website every Friday.

# Relating Goals to Competencies

- When an Employee inputs a goal in GMS, he or she must select a competency as well
- Allow employees and managers to align performance evaluation with the progress of success and challenges over the course of the year



# Goal Process Overview



The diagram is a vertical flowchart with four main steps, each in a colored rounded rectangle. Above the first step is a green square, and below the last step is a green downward-pointing triangle. The steps are: 1. Performance Meeting (green box), 2. Employee Inputs Goals (orange box), 3. Manager Approval (blue box), and 4. Dashboards (purple box). Each step is connected to a descriptive text block on the right.

## Performance Meeting

During the Performance Meeting between the Employee and their Manager, goals for the next review period should be identified.

## Employee Inputs Goals

The Employee will launch the To Do from their GMS Inbox and input their Goals in GMS. Once complete, he or she will click Submit.

## Manager Approval

The Manager will launch the Employee's Goals from their Inbox for review. He or she can click Approve, or Send Back for further revision.

## Dashboards

Once approved, the Goals will appear in GMS for both the Employee and Manager on specific Performance Dashboards.

# DEMONSTRATION!

Please watch while your instructor demonstrates:

## Goals in GMS

- Launching the To Do and submitting a Goal (Employee)
- Approving an Employee's Goal (Manager)
- Reviewing the My Performance Dashboard (Employee)
- Reviewing the Manager's Performance Dashboard (Manager)

# LET'S REVIEW!



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# Getting Help!

- **Online Resources**

- Navigate to [hr.georgetown.edu](http://hr.georgetown.edu) and click Performance Management

- **HR Client Services Partners**

Area of Campus	Name
Main Campus	Tania Draghi, 202-687-4829
Medical Center	Marlesa Adams, 202-687-2166
Law Center	Ife Tafari, 202-687-9618
University Services	Katina Porter, 202-687-2421
School of Foreign Services, Lauinger Library, Georgetown College, Office of Advancement, Athletics, Financial Affairs and the Office of Mission and Ministry	Sonya Sims, 202-687-6766