Managing Resources at Middlebury College
Monthly, 90 minutes or less

Set schedule & topics

2nd Wednesday 2:00-3:30

3rd Wednesday 9:00-10:30

Get slides for all sessions @
go/managers
Preparing for the Annual Performance Summary
We will cover:

- the pay increase process;
- performance management;
- Annual Performance Summary process;
- questions; and
- resources
Overall Process

January – March
  Completion of Annual Performance Summaries & creation of goals for new year

May
  Board of Trustees approves funds available for pay increases

June
  Letters mailed to employees detailing pay increase based on the Annual Performance Summary

July
  Implementation of pay increases
Context

Performance Management:

A year round activity!
Performance Management Cycle

Performance Review
Summarize the prior 12 months

Performance Planning
Set goals for the next 12 months

As needed
Daily, weekly, monthly feedback & coaching

Planned meeting:
6 month informal review

As needed
Daily, weekly, monthly feedback & coaching

January → March → April → December
Performance Management

- Set clear expectations
- Acknowledge good work
- Redirect poor work
- Keep a working file
- Meet throughout the year
When to Set Clear Expectations

• Outset of a major project
• Change in roles and responsibilities
• Annual Performance Summary
• 6 month review
• When you realize you didn’t do it!
Annual Performance Summary

- A part of performance management cycle
- Culmination of the year
- Reflects the prior 12 months
- Plans for the next 12 months
Benefits

• Part of ongoing dialogue
• Opportunity to set clear expectations
• Assessment
• Development
• Record
• Link pay to performance
Key Elements

- Preparation
- Evaluation
- Communication
The Process

• Evaluate each staff position
• Complete, sign and submit to HR by March 31\textsuperscript{st}
• Supervisor must complete to receive pay increase
• Based on the \textit{prior} 12 months
• Include goals for \textit{next} 12 months
• Schedule 6 month informal performance evaluation
• Commit to provide ongoing feedback as needed
The Form

Annual Performance Summary
Pay Increases

• Performance (merit) based
• 4 point scale:
  – Needs significant improvement
  – Approaching performance expectations
  – Successfully achieving performance expectations
  – Consistently exceeding performance expectations
Next Steps

- Connect with your manager & VP
- Read last year’s review(s) for your report(s)
- Review job descriptions
- Review any communication(s) about performance expectations
- Review working notes
- Gather input from others
- Schedule time to write
- Schedule meetings, provide instructions
What to Assess?

Job performance includes:

• Work accomplishments
• Interpersonal effectiveness
• Results
What to Assess?

• Past job performance
• Future needs
Basis for Assessment

- Job description
- Stated expectations
- Established goals
- Evolving needs
- Institutional alignment
Objective Assessment?

- Nice
- Poor attitude
- Helpful
- Does not care
- Works really hard
- Not a team player
Getting Started

• List your bases for assessment
• Consolidate into themes
• Assess relative to:
  • Work accomplishments
  • Interpersonal effectiveness
  • Results
Example Descriptions of Behavior
Thank you for being a team player!
...you have demonstrated excellent teamwork in our department. For example, I notice that when you have a break in your schedule you seek others who are busy and offer help. This helps to balance the overall workload of our department and enhances positive morale for the team.
Objective Description of Behavior?

Attendance has been a problem.
...you have consistently been late to work at least once per week for the last six months. We have discussed the need for improvement on this several times. Unfortunately you continue to be late and the impact is that constituents have been left waiting and service complaints have increased. It is my expectation that you will arrive to work on time for your scheduled shift.
Objective Description of Behavior?

Thanks for making improvements in the area of punctuality.
...earlier in the year we discussed the challenge of you coming in late for work at least once per week. We discussed the need for you to be here on time especially because it was impacting service to our constituents. You resolved the issue in a timely way and have consistently been ready to work for your scheduled shift. These improvements have been noted and are appreciated.
Objective Description of Behavior?

We can all use a little work on our communication. We’ve dropped lots of balls this year.
Objective Descriptions of Behavior

…on several occasions, you have failed to keep the team apprised of the status of the projects that you are managing and requirements from others. For instance, in September, we missed an important milestone to transition to the newest version of software, causing other critical systems to fail. It is important that you manage your project plans in a timely way and utilize the protocols that we have in place to update the team.
Questions or challenges?
Where to get help

- Laura Carotenuto    x2012 or lcaroten@middlebury.edu
- Drew Macan         x5261 or cmacan@middlebury.edu
- Human Resources    x5465, option 2

Resources can be found at go/managers