Preparing for your Annual Performance Summary

Workshop Overview

- Annual Performance Summary process
- Steps to prepare
- Writing methods
- Q & A
- Support
Performance Management Cycle

January – March 31st

APS & Goals

feedback & coaching

6 month informal review

feedback & coaching

April

December

Annual Performance Summary

- A part of performance management cycle
- Culmination of the year
- Reflects the prior 12 months
- Starts plans for the next year
Overall Process

January – March
• Complete APS & create of goals for new year

May
• Board of Trustees approves funds available for pay increases

June
• Letters mailed to staff indicating pay increase based on the APS

July
• Pay increases

Track your own Performance

• Ask what is expected
• Seek feedback
• Keep your own notes
• Seek time with your supervisor over the year
When to Seek Clear Expectations

- New task or project
- Change in roles and responsibilities
- Annual Performance Summary
- 6 month review
- When you realize that things aren’t clear!

APS Form

http://www.miis.edu/offices/humanre sources/employee
## Performance Designations

<table>
<thead>
<tr>
<th>Significant improvement required</th>
<th>Approached job performance expectations</th>
<th>Achieved job performance expectations</th>
<th>Exceeded job performance expectations:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performance was not effective with regard to work results &amp;/or interpersonal effectiveness</td>
<td>Effective performance in some but not all areas with regard to work results &amp;/or interpersonal effectiveness</td>
<td>Effective performance with regard to work results &amp; interpersonal effectiveness</td>
<td>Achieved job performance expectations and significant accomplishment(s) with respect to work or interpersonal results</td>
</tr>
</tbody>
</table>

## Set Expectations for the Whole Job

![Set Expectations for the Whole Job Diagram](Image)
Performance Expectations & Assessment Guide

• First step - Use it now
  – Fill it in
  – Ask your supervisor to review & give input
  – Agree on the baseline for “Achieved Expectations”
  – Start preparing for your APS

What do I have to do to exceed expectations?

• Be open to the conversation
• It begins with first achieving work and interpersonal results
• What does exceeding expectations mean to you?
• What do you think it looks like?
Writing Your APS Self Appraisal

- Collect information about your performance
- Evaluate the information
- Write the summary

Collect Information

- Job description (essential functions)
- Reports or summaries you provide
- Last review
- Notes & emails
- Input from others
- Significant events (check your calendar)
Evaluate the Information

• Begin with the end in mind
  • What are the key things you want to focus on?
  • Include work results & interpersonal effectiveness
• Avoid only focusing on recent events

Write

• It is a summary
  • It supports a conversation
  • Attachments are fine – choose a few that are representative
  • Have your back up data handy

• Be clear and concise
  • Use representative examples
The SEER Writing Method

- Summarize
- Elaborate
- Example
- Restate

“One of my strengths is handling difficult calls. I have been told that I remain calm, listen to concerns, and come up with good solutions. One of our biggest customers was ready to leave us, but they stayed after I was able to resolve the delivery issue on the Cosmo project. I feel that my ability to understand and solve problems has helped improve our service.”

Bullets or keep it short?

Summary Example Method

- Two sentences
  - Summarize the behavior or performance
  - Give an example

- I have been effective with difficult calls. I was able to solve the Cosmo problem by staying calm, listening and providing a solution that worked for our customer.
- I have trained three new team members on how to handle tough calls and their results have been positive
Shorter?
What did you do? Why does it matter?

- I am good at solving customers problems so they stay
- Trained 3 new staff on “tough calls” for better service

The Meeting

- Come prepared to talk as well as listen
  - What were some highlights of your year?
  - What do you like or appreciate most about your work?
  - What do you want to continue into the new year?
  - What do you want to change or improve?
- It’s about your job performance
- Listen and be open to feedback
- If feedback comes as a surprise, discuss why that is and how it can be more timely and effective
- It is ok to add comments to the form
After the meeting

- Keep a copy of your Annual Performance Summary
- Review your upcoming goals
- Seek support if needed
- Set up a system the works for you to track your goals and performance for the next cycle
- Seek feedback
- Ask for the 6 month informal review to be scheduled

Next Steps

- Connect with your manager about the process
  - When is your self appraisal due?
  - Is hand written okay?
  - When is the summary meeting?
  - Will you get an advanced copy of the summary?
- Schedule time to write your appraisal
- If you need help
  - Ask your supervisor or HR
My Checklist

- Save or print form
- Get copy of job description
- List of my questions
- Connect with my Supervisor
  - What are the key expectations for my performance?
  - When is my self assessment due?
  - When can I work on it?
  - Is hand written okay?
  - What if I have questions as I go along?
  - When is our summary meeting?
  - What do I need to do to prepare for the meeting?
  - When will I get the final copy of my APS?

Resources

- APS
  - Laura Carotenuto @ 2012
  - Sheila Cameron @5190
- HR x5465, listen for the APS help prompt
- I will email the following to you:
  - APS PowerPoint
  - Expectations & Designation Worksheet
  - SMART GOAL Guide
  - Coaching Guide
Where to get help

- APS
  - Michael Ulibarri  x 6404
  - Sheila Cameron  802-443-5190
  - Laura Carotenuto  802-443-2012

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