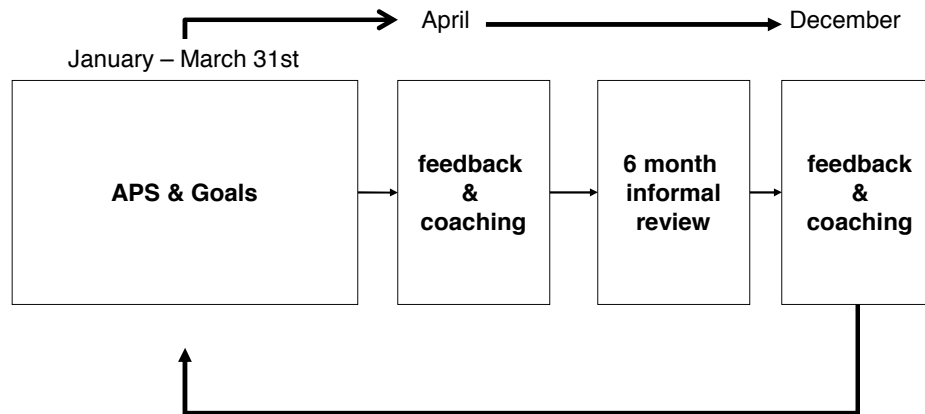


# Preparing for your Annual Performance Summary

## Workshop Overview

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

## Performance Management Cycle



## 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!

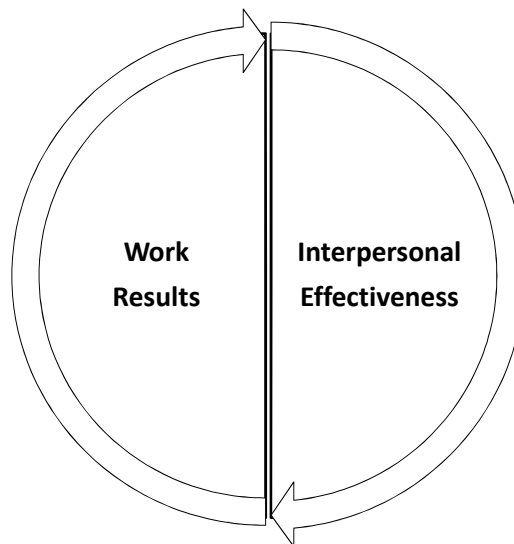
## APS Form

<http://www.miis.edu/offices/humanresources/employee>

## Performance Designations

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

## Set Expectations for the Whole Job



## 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 that 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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