

Preparing for the Annual Performance Summary

Workshop Overview

- Performance management
- Annual Performance Summary process
- Questions
- Resources

Overall Process

January – March

- Complete APS & create of goals for new year

May

- Board of Trustees approves funds available for pay increases

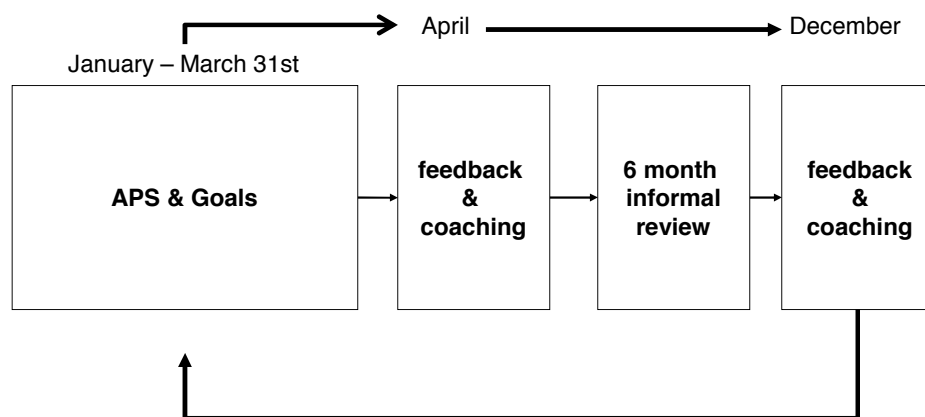
June

- Letters mailed to staff indicating pay increase based on the APS

July

- Pay increases

Performance Management Cycle



APS Overview

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

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!

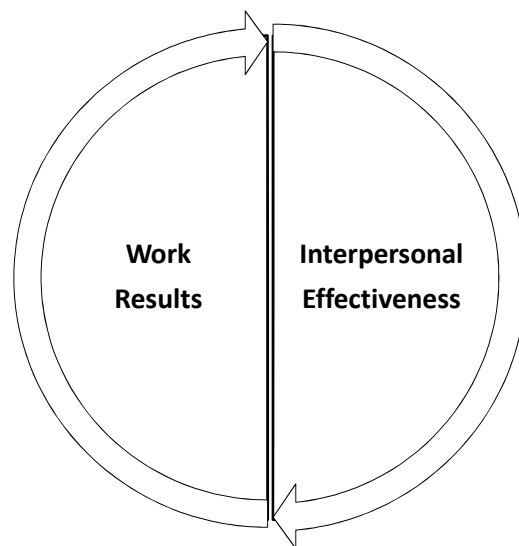
Annual Performance Summary

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

Why do it?

- Part of ongoing dialogue
- Opportunity to set clear expectations
- Assessment
- Development
- Record
- Link pay to performance

The Whole Job



APS Components

- Summary of the past
 - Success
 - Room for improvement
 - Goals for the future
 - Ongoing Support
- * Each one of these includes work results and interpersonal effectiveness

Prepare for the APS

- Set a schedule
- Prepare your staff members
- Collect data
- Evaluate the data
- Write the summary
- Meet
- Follow up

Schedule and Prep

- Have a plan
- When do you want to meet with staff members?
- When do they need to have their part to you?
- Explain their responsibility
- What do you expect?
- What can they expect from you?

Collect data

- Job description
- Reports or metrics
- Last review
- Behavioral observations
- Critical Incidents
- Working notes
- Their self appraisal
- Input from others

Evaluate the Data

- Begin with the end in mind
 - What are the key things you want to focus on?
 - Include work results & interpersonal effectiveness
- Avoid pitfalls
 - horns or halo
 - similar to me, different from me
 - recent events

Write

- It is a summary
 - It supports a conversation
 - Have your back up data handy
- Be clear and concise
 - Use representative examples
- Take breaks
- Do a final review when you are fresh

The SEER Writing Method

- Summarize
- Elaborate
- Example
- Restate

“Joe is outstanding at handling difficult calls. He remains calm listens to concerns and comes up with effective solutions. Joe saved us from losing one of our biggest customers when he resolved the delivery issue on the Cosmo project. He’s the go to person when it comes to showing new team members how to handle tough calls”

Want to Keep it Short?

Summary Example Method

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

“Joe is consistently effective with difficult calls. He saved the Cosmo project by staying calm, listening and providing a solution that worked for our customer.”

Meet & Follow up

- Provide the complete summary prior to the meeting
- The meeting should be a no surprises conversation
- Briefly share your view
- Ask for their view
- Answer questions
- Discuss next steps (perhaps a goal setting discussion)
- Thank the person
- Check in soon after

What do I have to do to exceed expectations?

- Be open the conversation
 - “Let’s talk about it...”
 - “It begins with first achieving work and interpersonal results, which is a great accomplishment - we can talk about how you are doing”
 - “Mostly we have to get routine work done, so what can really make you stand out is how well you work with others...(talk about specific behaviors)”
 - “Sometimes there are projects or opportunities to take on, we can talk about that”
 - “Would you like to set some goals to support what you want to do?”
 - “What does exceeding expectations mean to you? What do you think it looks like?”

Where to get help

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