# New Leader Training - Performance Management
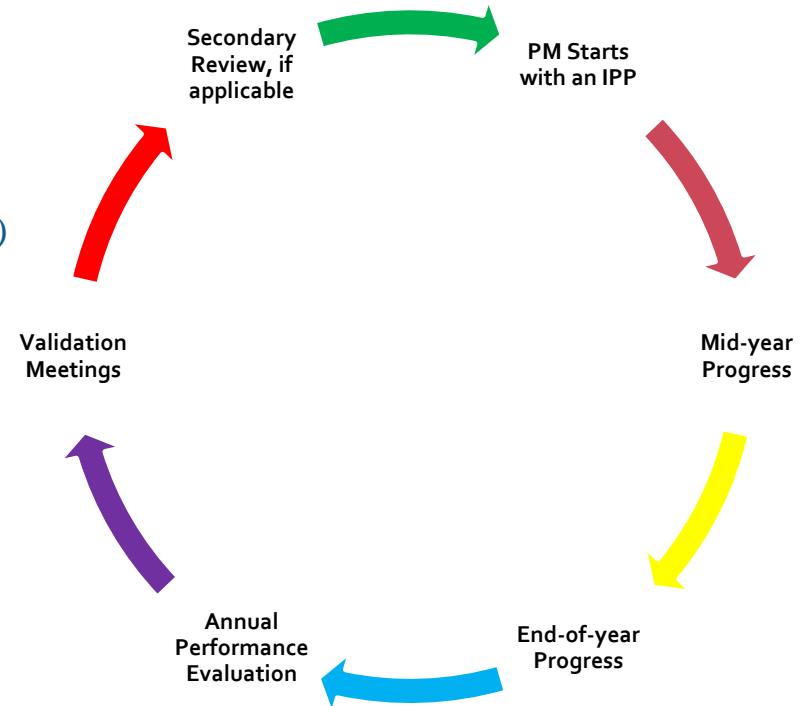
# The PM Process

1) Individual Performance Plan (IPP) development
2) Mid-Year Review
3) End of Year Evaluation
   - Employee Self- Evaluation
   - Leader Evaluation
4) Validation
5) Secondary Review (if applicable)

# What is My Role in Performance Management as a Leader?

- Collaborate and assist your employees in creating and entering KPIs.
  - KPIs are entered annually for current employees in August/September.
  - As you onboard new employees throughout the year, you will also need to assist them in creating their KPIs. Faculty hired after December 31 and staff hired after January 31 will not need to complete KPIs or the performance evaluation.
- Provide ongoing face to face feedback to each employee regarding KPI progress, job performance, and College values during mid-year reviews.
  - Mid year reviews occur in November/December for faculty and January/February for staff and administrators.
- Complete the leader portion of the performance evaluation for your employees.
- Participate in the validation process.

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# PM Website (Calendars, Values, Performance Ratings, and Procedure)

[Performance Management Website](#)

# IPP Development Reminders

- The purpose of IPPs are to foster collaboration between you and your employees in determining goals, accomplishments, and professional growth for each employee every year.

- Employees typically write 3-5 measurable Key Performance Indicators (KPIs).

- KPIs are meant to be project or development focused and are not meant to mirror an employee's job description. KPIs can include projects within or outside of the employee's department.

- **NOTE:** Since KPIs from the previous year carry over to the current year, a recommendation is for the employee to add the fiscal year in front of each KPI. This way, when the previous year's KPIs carry over, the employee will easily be able to identify the KPIs for the current year.

# Create Individual Performance Plan

Create your KPIs.

All fields marked "*" are required

**Title** *

TYPE IN THE KPI HERE

**Description**

| B | *I* | U | S | *I*x | | ≣ | ≣ | | ≡ | ≡ | | ABC |
|---|---|---|---|---|---|---|---|---|---|---|---|---|

TYPE IN THE MEASURES OF THE KPI HERE. WHAT WILL SUCCESS LOOK LIKE?

**Start Date**

8/3/2021

**Due Date** *

8/13/2021

**Categories** *

Select options ▼

☐ Select All
☐ Operational Excellence
☐ Our People
☐ Outreach and Partnerships
☐ Student Success
☐ Workforce and Economic Development

Upload up to 3 attachments. Maximum upload 1mb

# End of Year Evaluation

**Writing Performance Evaluations**

- The assumption is that every employee provides "valuable" contributions and comments will clearly support any other rating (higher or lower).
- There should not be any surprises regarding a "Room for Improvement" rating.
- If your employee has changed leaders during the PM cycle, the current leader should gather input from the previous leader, if applicable.
- Provide comments that state what the employee has done well, and what are the opportunities for the next evaluation period.
- Base your comments and ratings on achievements, actions, and behaviors during the current evaluation cycle. Items outside the current cycle cannot be included.

# End of Year Evaluation

**Provide Supporting Rating Comments**

Values:

- The goal is not to restate the value, but instead give specific examples of **how** the value was demonstrated.
- Example – Inclusivity: John Doe encourages team members to understand the diversity in human values, beliefs, practices, and actions of their students, colleagues, and counterparts across the district.
- Example – Collaboration: John Doe strives to build an atmosphere of trust, mutual respect, and openness with other team members, colleagues, and counterparts across the district.

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# End of Year Evaluation

**Provide supporting ratings comments**

Performance:

- Valuable rating:
  - Give specific examples of what was accomplished and achieved regarding the job description and KPIs.
  - State the results or impact of these accomplishments.
  - Example – Jane has done a good job this year supporting students individually by emailing each one when they miss a class, improving on the structure of the MATH 0104/0314 course, offering presentations on helpful and innovative ideas for students and colleagues, and supporting her coworkers by mentoring adjunct instructors.

- Above or below Valuable rating:
  - Give examples of where the employee exceeded the expectations of the job description or did not meet the expectations.
  - Give examples of how the employee met the KPI or did not achieve the KPI.
  - Example - John is a consummate professional in his work. He engages routinely in several areas within department, students, and the college as a whole. He achieves his goals around completion and great customer service which, at times, means thinking outside the box and dynamically shifting the process and tasks to be achieved. John also served on the DEI Committee and collaborated with OTD to provide online training.

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# Validation Overview

- A validation meeting is held by department College-wide. For example: Student Services or Mathematics.

- Each leader advocates for a particular rating for their employee(s) based on their accomplishments during the performance cycle.

- If an employee is rated Valuable, the discussion is usually very brief – that the employee met their KPIs and demonstrate the Values.

- If an employee is rated as Room for Improvement, they must have received at least a Corrective Action Notice during the performance cycle.

- If an employee is rated as Notable or Exceptional, the leader needs to give 3 bullet points of what that person accomplished that was above and outside their job description. For example, they may have worked two jobs for a matter of months while a replacement was found for a position, or they may have been on a College-wide committee that was tasked with a substantial project. Another example is to significantly improve a process.

# Performance Review and Evaluation Feedback

- As a leader, you should schedule a meeting with each of your employees after SLT validation has occurred and evaluations are released back to you.

- The feedback discussion should take 30-60 minutes per employee.

- Performance evaluations are not released to employees through Cornerstone until after face-to-face feedback discussions have occurred.

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# Secondary Review

- A secondary review allows an employee to "appeal" their validated performance rating. The purpose of the secondary review process is to ensure employees are fairly evaluated.

- The review allows employees to:
  - Advocate for themselves
  - Clarify their contributions to the College
  - Present to the validation team

- The secondary review of validated performance rating procedure specifies the process for reviewing a validated rating and is available to full-time employees, including faculty, staff, and administrators.

# Timeline for Secondary Review

1. The employee has 10 working days to express concern about their final validated performance rating upon receiving the evaluation from you.

2. As a leader, you then have 10 working days to respond to the employee after receiving their request.

3. The respective validation team, including the Provost or respective Vice Chancellor, will convene for a secondary review.

4. The SLT member has 10 working days to notify the employee of the team's determination.

5. Review Procedure IV.4004.A.a, Secondary Review of Validated Performance Rating.

# Leadership Competencies

- The SLT reviews and identifies key competencies critical to leadership success. These competencies are identified to ensure we grow leadership capacity, and to achieve College priorities, strategies, operations, and student success.

- Leadership competencies apply to any leader who has full-time direct reports.

- As a leader, you will be required to document how you demonstrated these competencies in your self-evaluation.

- Competencies will be considered and discussed as part of your validation.

# Questions?

**PM Website:**

https://www.sanjac.edu/about-san-jac/college-operations/human-resources/resources/performance-management

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