

Performance Management Overview

0:00

My name is Maggie Denton.

0:02

I am the Assistant Director of Employee Relations and Engagement and I am joined here today with my wonderful colleague, Betsy Molinari.

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She is our senior Specialist and shares a working title with our other senior specialist, Justin Wilde.

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We are under the direction of Director Charlotte of Self.

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And rounding off our team is our fantastic accommodation specialist, Emily Everts.

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And so if you're not familiar with our unit, we just wanted to take an opportunity, kind of share a little bit about how we serve the institution.

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And so a lot of our work is through consultations, helping employees and supervisors interpret policy, work through conflict, help with team engagements, training and most importantly, at least today, performance management.

0:52

So today, we're going to be sharing a little bit about the revised process that's going to start before we know it starting in January.

1:01

And so we're going to go ahead and get started this morning before we jump into it.

1:09

We have been getting so much wonderful feedback, comments, questions, inquiries about this new process throughout the various trainings that we've had so far.

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And so we really want to reiterate that if there's any questions that you have or want to provide some feedback that we truly want to make sure that this is a process that's I'm going to be very well understood and clearly defined.

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And we have that responsibility to make sure that that is available for all of you.

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So please do not hesitate to reach out with any questions.

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We are hoping to be able to address all the questions that arise out of today's training in the moment, but there may be questions that will serve the greater good of the institution.

1:49

And so we are thankful for those questions because we will respond to those not only in today's training, but also put those in our frequently asked feature on our website.

2:00

And so we appreciate your understanding and some of those questions may need to be parking loted due to the interest rate of times and also appreciate your assistance in developing those FAQs.

2:15

So I understand that we're all probably really excited to understand kind of what this new process looks like and what's expected of us as employees.

2:24

But before we get to you excited about that, I think it's important for us to really level set on why we are revising our processes and kind of where we are at that kind of led us to this point.

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And so last year, the institution engaged with the consulting firm by the name of Siegel and we did various focus group and interviews with over 113 and faculty, staff and stakeholders to really understand kind of where areas of opportunities are and where we can make some improvements.

2:53

And so on the screen, we'll look at that together, kind of the common themes that we got out of that work.

3:00

And so first and foremost, we heard that the current process is kind of last consistently across the institution and also oversight from the institution altogether.

3:14

We heard that the process currently is not very well defined nor well understood that our planning and evaluation, some of them are not clearly aligned with our key state goals.

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We have various rating scales being applied across the institution and multiple performance instruments or forms to evaluate performance are also being used across the institution.

3:38

And so once we got that feedback, we conducted a gap analysis to really see where those pain points are and how we can compare those against leading processes across the nation.

3:51

And so we're moving towards a more unified approach to performance management.

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And again, this will apply to all staff, so all university support staff and unclassified staff.

4:04

This would exclude faculty, student and temporary employees just due to the nature of their work.

4:13

So the performance management process that is coming into play as we return in January.

4:19

And we're hoping to clearly define this process through ongoing trainings, tools and resources.

4:23

So our time spent together really is just scratching the surface, kind of rolling out a broad overview of what to expect.

4:31

But our team is working diligently on ongoing tools and resources to make sure that you all feel supported as you engage in this new process.

4:41

And so we'll talk a little bit about the ongoing training and tools and resources that we're so excited to continuously improve upon.

4:51

We are also looking at one form for both planning evaluations and everything in between as it relates to the performance management process.

4:59

And so with that unified forms and supported by the unified process, we worked very hard to make sure that those form and its process clearly aligns with our K state mission values and institutional goals.

5:17

We also felt that it was very important to ensure that all employees are being evaluated using the same evaluation scale.

5:26

And so we are moving kind of away from employee performance ratings into a new kind of culture shift of performance levels and making sure that those are being applied equally across the university.

5:40

And then finally, I talked a lot about those forms and those process being unified and just making sure that from start to finish each year we are all on the same process and using those same forms.

5:54

So just to kind of get a better understanding of what to expect today we have about an hour with you all and we will be introducing the performance management life cycle.

6:02

So what employee and supervisor kind of do throughout the review period, We will be talking about key performance components, what is kind of expected through each of our review periods.

6:15

We will also introduce that shift from ratings to performance levels.

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And so we'll present those levels to you and also define which what each of those levels mean.

6:27

We'll also be taking a peek at the performance management forms.

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So we do have some QR codes embedded throughout the presentation for you to kind of follow along on your own device if you choose.

6:36

So if not, don't worry, sit back and relax.

6:38

We will also see those forms on the screen together and then once we got a good idea of kind of what the performance management life cycle is, what those key performance components look like, how employees will be evaluated based off that standardized performance levels and take a peek at those forms.

6:58

We're hoping to also make further connections and really break down this process into various steps throughout the process.

7:06

And then also very important to all of us that we make sure that you guys are empowered and informed on any additional resources that you may need to be successful in this process.

7:17

So I'm going to go ahead and turn this over to the wonderful Betsy, and she will be sharing a little bit about that annual life cycle.

7:26

Thank you, Maggie, Thank you all for joining us today.

7:30

We will begin this phase by talking about the annual performance life cycle.

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So as Maggie mentioned, at K State, we are moving towards a more dynamic and continuous approach to performance management.

7:45

That means instead of confining performance discussions to once a year, we see performance management as an ongoing process that evolves throughout the year with the employer and the supervisor employee.

7:58

Sorry.

8:00

This approach ensures that feedback is timely and that recognition is appropriate and relevant, hoping to create a more engaged and productive workforce.

8:12

So the first phase is the Employee Performance Planning phase, which would be January 1st through February 28th.

8:21

This is when we'll set clear goals and expectations for the year ahead.

8:26

Effective planning involves aligning individualized goals with organizational objectives, ensuring that each employee understands their role and their responsibilities.

8:37

The second phase is the mid.

8:39

Check in, which would be April 1st through June 30th.

8:43

This is a really important and critical opportunity to review progress, address any challenges and make adjustments if needed.

8:52

This phase helps keep everyone on track and ensures that goals remain relevant and achievable as circumstances may have evolved.

9:01

Next, moving into the end of the year performance.

9:04

Review This would begin November 1st through January 31st and this is the formal evaluation phase of the process over the last year.

9:18

It's a really relevant opportunity to reflect on overall achievements, areas for improvement and then using that information to set goals for the coming year.

9:29

This review should be comprehensive and constructive.

9:32

Certainly nothing shared at this time would be a surprise to the employee.

9:37

They should be well attuned to how their year is progressing with ongoing coaching and feedback.

9:44

So opportunities for ongoing coaching and feedback aren't listed in this life cycle because we recommend that they occur as needed for positive recognition.

9:54

Notice that employee doing something exceptional?

9:57

Please don't hesitate to document that and celebrate that with them.

10:01

Recognizing their efforts and showing genuine appreciation really provides a lot of immediate encouragement.

10:08

Positive reinforcement is essential for motivation and just making sure that people are recognized for the good work they're doing.

10:16

Additionally, if there's concerns that need to be addressed, please do so in a timely manner.

10:23

If performance or conduct are falling below expectations, it is really important to go ahead and sit down with the employee, address that and develop a concrete plan moving forward.

10:33

So again, ongoing coaching and feedback would happen as needed throughout this life cycle.

10:42

We are going to talk about key performance components.

10:46

Previously, performance was addressed on rating.

10:51

We are again moving towards levels based on these 4 components which are success in accomplishing core responsibilities and objectives, modelling K state values, demonstrating K state standards of excellence, and achieving professional development objectives.

11:10

Some individuals do require ongoing certification or licensure or continuing education for their roles.

11:19

If so, Please note those requirements in this portion of the planning phase for your employee.

11:29

So now we're going to talk a little bit about standardized performance levels.

11:33

As Maggie mentioned, in the beginning, performance was kind of rated all over the place, so not consistently.

11:41

What we've done a lot of work to do was to standardize performance levels so that it is recognized where people are performing with an understanding that performance ebbs and flows throughout the year.

11:54

So I will go over each of the four levels with you.

11:58

The first is defined as distinguished performance.

12:02

This employee served as a role model throughout the year by consistently and significantly going above and beyond what would be considered successful performance.

12:12

They achieved successful performance in the core responsibilities of their position, accomplished objectives, and exemplified K states, values, and standards of excellence.

12:24

The second performance level is defined as successful performance throughout the year.

12:28

This employee achieved successful performance in the core responsibilities of the position.

12:34

They accomplished all or most objectives and demonstrated K states, values, and standards of excellence.

12:43

The third level is variable performance.

12:47

This is when an employee is inconsistent in their ability to meet expectations for core responsibilities, objectives, and or demonstrating key states, values, and standards of standards of excellence.

13:00

Addressing identified performance gaps should increase success and fully meeting performance standards in the year ahead.

13:10

And lastly, the 4th performance level is significant performance gaps in the year.

13:16

This is where overall the performance fell well below K State standards.

13:21

Addressing identified gaps in core responsibilities or demonstrating K State's values and standards of excellence must be an urgent priority.

13:33

Hey, awesome, Mickey, Betsy.

13:35

So now that we kind of understand that performance management life cycle again, we want to just break that down into 6 steps so we can understand really where we're needing and what we're needing to do throughout the life cycle.

13:46

And so January 1st through February 28th, we are doing employee performance planning, really making sure that we set up clear expectations for our employees as they start their performance for that review.

14:02

Next we move into that ongoing and coaching and feedback aspects.

14:06

So kind of like what Betsy was sharing that we have these forms available and you know, there's employee performance planning and we check on that plan and then the end of the year conversation.

14:16

But we really want to make sure that there is an understanding that coaching and feedback, whether it be correcting the deficit or encouraging great behavior skills, things like that.

14:29

But there's meaningful conversations throughout this life, life cycle and so why we have it slotted at stop Step 2, we would like to see that throughout the year.

14:39

Step 3 is our mid.

14:41

Check in from April 1st through June 30th, again, just kind of checking in on that initial plans and making adjustments as needed.

14:48

Step 4 is the employee self reflection, so November 1st through November 30th, where employees get an opportunity to really voice how they feel and that they did in that review.

15:01

Step 5 is our supervisor assessment, so November 1st through November 31st, supervisor working through kind of a similar exercise where they think through the holistic picture of that employee's performance.

15:16

And then step 6 is the supervisor and employee conversation, November 1st through January 31st.

15:21

So once the self reflection is received by the supervisor, the supervisor has an opportunity to work through their assessment of performance, that document being approved by the reviewer, and the employee and supervisor can then sit down and have the conversation about the things that were documented.

15:40

And then moving right back into step one as you transition to a new year.

15:47

So we're going to kind of break these down even further.

15:50

So step one, we just talked about being the employee performance plan.

15:54

So January 1st through February 28th, the ask is to complete the employee performance plan.

16:00

And so for those of you who may have not been on a calendar review period, just kind of want to reiterate that this new process would be the review period of January 1st through December 31st.

16:12

So top of our review period, we are completing that plan and we are going to be establishing smart core responsibilities and objectives and discovering what professional development interests and plans that employee has.

16:27

Talking a little bit about how employees can demonstrate K State standards of excellence and model K State's values.

16:34

And then finally at the bottom of the form, signing and dating, basically acknowledging that there was a collaborative conversation to start this employee performance plan.

16:45

So we will go ahead and take a look at that form together.

16:50

So as you can see at the top of the form we have employee name, employee ID, position title, planning period.

16:56

And then towards the bottom of the screen on the left hand side, we have core responsibilities and objectives.

17:02

So Patsy's gonna talk to us a little bit later on kind of what we are hoping to see in those core responsibilities and objectives area.

17:11

And so then on the right hand side, how success will be measured, clearly defining that for the employees so they understand what success looks like and how their supervisor will be measuring that success.

17:26

And we have professional development interest and plans at the top and demonstrating K State standards of excellence at the bottom with an opportunity to add any additional work group specific standards.

17:37

And this is an optional space, but we hope that there is value for those who may need that up.

17:43

At the top of our final page, we have modeling K State's values, the definition of those, and then the all important acknowledgement employee and supervisor's signature and date.

17:56

OK, we're going to talk a little bit about performance planning and using the SMART framework to set core responsibilities and objectives.

18:07

The SMART model is really valuable when establishing core responsibilities or objectives because it provides clarity by defining specific goals and outcomes.

18:18

This clarity helps employees understand exactly what needs to be achieved, reduces ambiguity, and helps just level set that everyone has the same understanding.

18:30

So the first is specific.

18:32

A specific goal is clear, it outlines exactly what needs to be accomplished, and it leaves no room for confusion or misinterpretation.

18:42

The M stands for Measurable.

18:45

A measurable goal includes criteria to track progress and determine when the goal has been achieved.

18:52

It involves defining how success will be measured.

18:56

The A stands for Achievable and Achievable goal is realistic given the available resources and possible constraints.

19:06

It should be challenging for the employee, but certainly they would have the ability to successfully accomplish it.

19:13

Art is relevancy.

19:15

A relevant goal aligns with broader institutional goals and objectives to include priorities for the organization.

19:23

But it also ensures that the goal contributes meaningfully towards the overall position description for the employee.

19:31

So making sure that the goal is relevant for both the employees work and the university of the whole.

19:38

Lastly, time bound.

19:40

A time bound goal includes a specific time frame or deadline by which the goal should be achieved.

19:46

It establishes when results are expected.

19:50

Those of you who have taken the Supervisory Foundation's training sessions, you're familiar with the SMART goal of mopping the floor.

20:00

Those of y'all who may not have taken that, we have a couple examples for you.

20:05

So we will look at those a little closer and see what if you guys think they are following the framework.

20:10

Framework or perhaps not OK, our first example says offer excellent service experiences to students.

20:20

If you guys were in person with us, we'd have you raise your hand if you think this follows the framework.

20:25

It is a pass fail quiz.

20:27

However, unfortunately this example does not do a good job of using all the smart the smart framework.

20:35

So we know it's not specific.

20:38

The objective does not specify how the front desk experience will be improved.

20:43

Certainly not measurable.

20:45

There's no clear metric.

20:47

We don't know if this is achievable or how it would be achieved.

20:51

Doesn't talk about actions or resources.

20:54

We're not sure of the relevancy here.

20:57

Don't have any details on how it aligns with the university or the employees position description, and certainly not time bound.

21:04

There is no deadline or time frame for completion, so we're going to look at another example, see if this one is a little better.

21:15

This example says reduce the average wait time for in person inquiries by 25% within the next four months by introducing A streamlined check in process and increasing front desk staffing during peak hours.

21:31

So we understand this is a little bit more specific.

21:35

The objective specifies reducing wait time, which is wonderful.

21:40

It is measurable.

21:41

The goal is to reduce the wait time by 25%.

21:46

It can be achievable assuming the changes in process and staffing are feasible.

21:52

I would say it is relevant.

21:54

Reducing wait time, improved service delivery and student satisfaction.

21:59

And we know it is time bound because it was identified that the target was to achieve reduction in the next four months.

22:10

So we're going to talk next a little bit about performance planning and professional development.

22:16

Those of y'all who know me know I am a lifelong learner and very much appreciate and seek out opportunities to continue continue my professional development.

22:27

So this part of the process I think is pretty cool.

22:31

As mentioned before, if the employee is required to have licensure, certification, certain training or credentials for their role, this is where you would add that requirement for the year.

22:44

However, if they are not, this is where the employee and the supervisor would get to have a meaningful conversation about what training or additional education is relevant for the position and also appropriate for the employee, kind of based on what they are currently working on and what their goals might be for the future.

23:04

So this is a great opportunity to just continue to strengthen that relationship between the employee and their supervisor, plan out some things together and look for available resources.

23:17

Every employee is different.

23:18

Not every employee would consider themselves a lifelong learner, and that's certainly OK.

23:23

There's a lot of different opportunities for this for this part.

23:28

OK, great.

23:28

So kind of next on the form, we had demonstrating K state standards of excellence.

23:36

So as you will recall, it had each of these standards of excellence presented on the form, but also the definition of each.

23:45

And so really when you're engaging with that form, what we are hoping is that employees can see their work or themselves within these standards of excellence.

23:55

And so to really kind of assist with that, we do kind of want to take a deeper look at those, talk about those definitions and just share some practical examples.

24:05

We understand that this may look a little bit different per employee, parole department, unit, all of that good stuff.

24:13

And so if there is an opportunity for teams to kind of huddle together and kind of expand on this conversation, we strongly encourage that.

24:23

But we'll go ahead and take a look together today.

24:27

So the first we have accountability and this is defined as honoring commitments and assuming responsibility for delivering results that are aligned with K State's high standards.

24:37

And so Betsy had just got done sharing with us the importance of the smart model that really has all those components embedded in the realm of accountability.

24:46

And so if you have or are an employee that is completing those core responsibilities and objectives in a successful manner, you know they are achieving those professional development goals that they had set out.

25:00

That would be a great example and a really relatable one of how they could be demonstrating accountability in their line of work.

25:08

Next, we have adaptability, which is defined as adjusting to situations and conditions that require changes and responsibilities, ways of working or interacting.

25:18

And so when we think of something that's pretty relatable, I venture to believe most of us have experienced some type of short staffing in our careers.

25:27

And so, you know, when that happens, somebody kind of steps up, covers down the work until a replacement is named.

25:33

And so if your team experiences that and has that employee that is kind of stepping into that role until a replacement is named, that would be a great example of adaptability.

25:45

Commitment to continuous improvement is defined as being receptive to feedback and looking for ways to do things more effectively or efficiently.

25:53

So if any of you've had the pleasure of dining in any of our dining services across the organization, you know how good the food is.

26:01

And so if you go in there and notice me on that favorite dish and I go in and it's it's never available.

26:08

We provide that feedback to a food service worker who then interns has greater conversations about maybe making higher portions of that or pushing that food out in a quicker manner.

26:21

That would be a great example there of commitment to continuous improvement.

26:27

So moving right along, we have effective communication, which is defined as listening for understanding, communicating in a positive and respectful manner, sharing information with those who need it.

26:39

And somebody who kind of embodies this for me is our administrative consultant.

26:43

Day in and day out, she is sending emails, meeting invites, making sure that we are all in the right place at the right time with the information and resources that we'll need to be productive.

26:54

And so if you are that person for your team or know somebody on that team is a great example there of effective communication.

27:03

Next up, we have job knowledge.

27:05

This is defined as demonstrating the knowledge and skills necessary to perform effectively, understands the expectations of the job and stays current with new technologies, methods, and processes in the area of responsibility.

27:20

Somebody who kind of comes to mind is our facilities team.

27:22

They do amazing work making sure all of our campuses are in good working order.

27:28

And so if they were tasked with finding an alternative solution for lighting, maybe wanting something a little bit more cost efficient and or accessible and they go out, do their research and ultimately select a solution that would be viable would be a great example there of job knowledge.

27:46

Next, we have judgment, which is defined as making wise choices and thoughtful decisions by collecting information and considering the implications of potential options.

27:57

We have a very strong IT team that makes sure that we are protected in the cyber world.

28:04

They do a lot of work to make sure that they are testing in a controlled environment and making appropriate installs outside of normal work hours to avoid disruptions.

28:15

And so when I think of judgement, I think of that team and how well they demonstrate that standard of excellence.

28:25

Next, we have service orientation.

28:27

So delivers a high quality programs and or services by listening well, demonstrating empathy, being responsive and engaging and creative problem solving.

28:38

And so if you've been with the university for a while and have had the opportunity to really experience us receiving the next generation of learners and know how move in day can present a lot of different concerns and pain points for our students.

28:56

And so if you were kind of needing to see this seniors excellence in play, I highly encourage you to be around when we welcome those next generations of learners.

29:06

There are so many good examples of people from various departments putting all hands in to make sure that our students have what they need to be successful in the academic year ahead of them.

29:20

And then finally, we have teamwork.

29:22

So it creates a positive and productive work culture and supports the success of all members in the work group.

29:30

And so we were given this great strategic plan to really move our university forward.

29:36

But we would be wrong to think that we can all do this in a silo.

29:41

And so there are going to be so many opportunities to cross collaborate with different departments to make sure that we can move our strategic plan forward.

29:50

And so this might look like an academic advisor, a member of IT team and maybe some additional subject matter experts coming together and developing some online resources for our students.

30:03

And so in that we see those minds getting together and making sure from their viewpoint that that is going to be a great resources for our our students and ultimately demonstrating K state standards of excellence.

30:25

Thanks, Maggie.

30:26

We are going to talk next about K state values.

30:31

So just like K State standards of excellence, we're going to look at an employee's ability to model key state values throughout the review period.

30:41

So we'll talk about each one and some possible examples.

30:45

Connection cultivates trust and builds relationships.

30:49

Maybe you are an academic advisor where you supervise an academic advisor.

30:55

In this role, we see students struggling sometimes or appear to be disengaged.

31:02

I think of connection with academic advisors who really take the time to schedule one-on-one meetings with students to talk about concerns, listen with a lot of empathy, and offer support or resources throughout the semester.

31:17

Just keeping in mind how important that connection and relational work is.

31:24

Courage.

31:25

Courage.

31:26

The person does the right thing, even when it's hard or unpopular.

31:31

I know I certainly have a sense of safety and security thanks to our devoted campus police and their presence.

31:39

I think they are a wonderful example of demonstrating the value of courage in so many ways.

31:45

For example, they may witness a staff member displaying inappropriate behavior in front of students.

31:53

They understand that reporting that incident could potentially cause backlash, but they actively demonstrate courage and maintain a positive, safe environment for us and especially our students in a very consistent way.

32:08

Moving on to impact, that is when an individual continually seeks to make K State a stronger university.

32:17

I think it's so wonderful that our university is filled with subject matter experts and a great way to model the value of impact could be to collaborate across units with several other subject matter experts to enhance programming engagements and other activities.

32:38

The value of learner focused means contributing to an exceptional experience for K State students and others who learn from the university's programs and services.

32:49

All across Kansas, in all 105 counties, we have amazing extension agents that do a variety of work.

32:58

It may be brought to an agent's attention that a community member is needing assistance with a topic regarding garden maintenance, but understanding that we have very busy community members who may not be able to attend workshops, the agent would potentially create a short on demand guide or example that the learner could follow along with in their own unique way.

33:26

Also thinking about people centered champions a culture of belonging for all.

33:33

So for example, a power plant operator may notice a new Co worker is sitting by themselves and eating alone or perhaps not engaging in team meetings and maybe, you know, presenting like they're feeling isolated or not yet part of the group.

33:50

But this power plant worker could invite the new team member to sit with them at lunch or ask some kind of probing open-ended questions to build conversation and just really encouraging the team members involvement and sense of belonging as they on board in their new role.

34:09

And lastly, stewardship uses K states resources wisely.

34:14

For example, we think about how we bring our best selves to work.

34:18

So even though we may not actively work in accounting or within the opportunity for spending, we can still be a good steward of resources, thinking about how we manage our time, how we care for ourselves and ensure we have a good work life balance.

34:36

So again, these are all great opportunities to collaborate with your team and come up with practical examples of what these values may look like in your individual departments.

34:49

All right, we're going to move on to Step 2.

34:52

This is ongoing coaching and feedback.

34:57

So we've talked about this a little bit about the beginning, but the performance management life cycle has embedded of relevant opportunities that we encourage ongoing coaching and feedback either to celebrate the employee's success or to address deficits and come up with a plan to move forward.

35:18

So there are two different forms.

35:20

We're in HR, so of course we love our forms.

35:23

We encourage you to use those and document all the things that you're doing to provide this wonderful coaching.

35:30

So on those forms you would define or describe the coaching session.

35:34

You would review the recent performance, either if it was an area of strength or an area for development.

35:42

You would identify areas of like exceptional performance or perhaps skills to work on, talk about an action plan and gain the employees input.

35:54

When people provide their input, they are more likely to have buy in and see the plan through to fruition.

36:01

And of course, schedule follow up meetings.

36:03

Make sure that you have that ongoing coaching and check in opportunities for both the employee and the supervisor to make sure everyone's on the same track and signatures.

36:14

We highly encourage you to obtain signatures on these documents along with dates.

36:22

OK, so we're about halfway through, we're at the mid.

36:25

Check in and this is occurring anywhere from April 1st through June 30th.

36:30

And during this time frame we will be completing the mid.

36:33

Check in form.

36:34

And So what that kind of includes is all those performance components that we kind of talked about at the beginning of the presentation and then kind of reiterated in step one of the employee performance plan.

36:47

And so it's really an opportunity to just check in on how things are going.

36:51

So we'll take a look at that together and kind of talk through what is expected in each of those areas.

36:58

So at the top of the screen, we see core responsibilities and objectives and professional development progress and a supervisor comment box.

37:07

And so at the mid.

37:09

Check in if you had sought out for a specific objective that due to some restraints or limitations that's just no longer feasible and there needs to be some changes to those objectives.

37:24

This would be a great opportunity for comments on that.

37:27

That originally the plan was this and we're moving now to this because of that kind of same thing with professional development progress.

37:36

Betsy is one of our strong learners.

37:39

She's constantly learning things and hey, I want to go and learn this too.

37:42

And so somebody like Betsy may get all of her professional development done in the first month of our review period and she may be hungry for more.

37:52

And so at her mid.

37:53

Check in, she may share with her supervisor that hey, I got everything kind of done from our initial plan.

37:58

Is there any additional opportunities?

38:00

It's really satisfied me throughout the remainder of the review period.

38:04

So really to summarize that if there's any changes to initial plan that there should be supporting comments in the mid.

38:11

Check in to speak to those things.

38:13

But we do also want to share as a caveat that it this the original plan can be modified at any time due to things that kind of present themselves.

38:23

We just strongly encourage that there is some documentation whether it be on the initial employee performance plan at the mid.

38:31

Check in of any of those changes the why and kind of where we are pivoting to OK, So then at the bottom of the form and kind of continuing on at the top of the form, we have demonstrating K state standard of excellence and modeling K state's values.

38:47

And so the supervisor would be required to go and see at which level that employee was demonstrating and modeling those on a yes, no basis.

38:57

So yes, the employee is being accountable, they're achieving all of these things, they're doing a great job or no, they are not at the level in which we want them to be.

39:08

And so if any of those standards of excellence or modeling case A values are determined, no

supervisors will be required to provide feedback on how to really rise that level of success moving forward.

39:22

So this could look like, no, you're not being adaptable.

39:26

We really needed you to assist with this programming that we're going on with.

39:31

And so in the future, we're going to ask for your assistance.

39:35

And that's kind of what it looks like.

39:36

And so it should be clear to that employee what skills behaviors they need to improve upon so that they can successfully demonstrate or model those things moving forward.

39:47

We do also want to share that even if you have an employee who's doing a great job demonstrating those standards of excellence, they're modeling RK state values, feedback is so important.

39:56

And so even if they are successfully doing both of those things, it'd be important to also give them feedback.

40:04

So just reiterate that positive behavior that they're demonstrating.

40:09

OK.

40:09

And then at the bottom of that form, we have the mid.

40:12

Performance summary and really just help supervisors with some prompts to get to the heart of a holistic performance summary.

40:21

And so then at the bottom there, they'd have some opportunities to really support what they had shared throughout the form.

40:29

And then finally an acknowledgement that this conversation occurred and then the employee has an

opportunity to make some comments on the feedback they received or any general feedback that they would like to share.

40:43

That employee comment box looks teeny tiny on our screen here.

40:47

We do want you all to know that those boxes are expandable, so we don't want anyone to feel limited in their comments there.

40:57

We're going to move on and talk about the fourth phase, which is the employee self reflection and the employee self reflection.

41:10

The employees will have the opportunity to provide feedback about their year from November 1st through November 30th and this occurs before the supervisor completes the year end review.

41:26

Remember when we talked about keeping notes and things of occurrences throughout the year?

41:32

This is certainly important because it's not always easy to remember everything that took place.

41:37

So we certainly want to encourage all employees to keep desk notes of their accomplishments or challenges that they work through because it's certainly relevant to put it down on this portion of the document supervisor, if your employees lack the writing skills to complete this portion of the performance management process, you can offer to meet with them and have them describe to you what comments and things that they would like included.

42:07

So this document would have reflections on the performance during during the review period, looking at achievements and also noting barriers that perhaps limited effectiveness or success.

42:20

Please recognize the term barriers does not define any personal or medical information that perhaps kept the employee from work that would remain confidential.

42:33

Barriers in this situation maybe would be something like staffing or funding.

42:39

So something that certainly challenged the employee but was not due to their personal needs outside of work.

42:45

Comments on professional development efforts and then comments on the degree to which K states values and standards of excellence were demonstrated while performing the role.

42:55

So we'll take a look at this.

42:58

The first part is going to list the key responsibilities and objectives and then have a note section for accomplishments and or barriers that took place.

43:10

The second part has the opportunity for professional development, so documenting how the professional development accomplishments aligned with the planning phase.

43:20

Maybe if there were any changes or any additional items covered that would be appropriate to include how K states values were modelled.

43:30

Certainly want to provide some examples.

43:33

Again, the comment box is expandable, but there are no minimum or maximum word count criteria.

43:39

For those, we would move on to demonstrating standards of excellence, the employee would be able to self identify if they consistently demonstrated and consistently demonstrated or were not sure how to document related to those standards of excellence.

43:58

And lastly, moving on, there's an opportunity to provide an overall summary.

44:02

So anything maybe that wasn't covered, the employee would have the opportunity to add.

44:07

And then of course, the signature and the date.

44:12

OK, so we're moving into Step 5, the supervisor assessment.

44:16

This is going to occur from November 1st through January 31st.

44:21

And this is when the supervisor then completes their performance.

44:24

Review for their employee.

44:26

I'm talking about those key performance components again.

44:29

So our core responsibilities and objectives, how they were achieving professional development objectives, modeling K State's values, demonstrating K State's standards of excellence, and then ultimately assigning at which level that employee performed for the review period, providing a summary of comments and then the all important acknowledgement.

44:50

So we'll go ahead and take a look together and make sure that we understand what is expected each piece of this form.

44:58

So on page one, we really wanted supervisors to have an opportunity to review those performance levels before they started to engage in the form.

45:08

So making sure that they understand how each level is defined and then kind of similar to the mid.

45:16

Check in making comments on core responsibilities and objectives and the professional development accomplishments and summarizing those comments there.

45:26

Just like Betsy had shared, we have talked a lot about various forms and methods of capturing achievements and maybe some areas of opportunity throughout the year.

45:36

So we are hoping that it really empowers and supports our supervisors as they go to complete this form that they can post from some of those form documents information and provide that holistic summary for each component.

45:52

And there at the bottom we have modeling K states values.

45:55

And so did they exemplify this form consistently modelled, inconsistently modelled or seldomly modelled that value.

46:02

And so for any value that is falling below consistently modelled level, the supervisor would be

required to provide the reasoning and kind of some ideas for improve it improvement, whether that's focused on a specific behavior or improvement of a skill, feedback would be required there.

46:22

But again, we want to reiterate that we want to have some positive reinforcement.

46:28

So if you have an employee who is really modeling those values to also share that feedback so that they continue to be successful in that same kind of concept for demonstrating standards of excellence, any standard of excellence falling below a successful demonstration, providing that feedback on how they can improve that moving forward and making some reaffirming comments.

46:54

If you have somebody who's doing a great job with that.

46:57

And then ultimately at the bottom of the form determining at which level that employee performed throughout the review period.

47:06

And then on the last page we have the summary of supervisor comments.

47:13

So it can a supervisor have an opportunity to really continue to capture that holistic approach.

47:20

And then in the acknowledgement feature, you will see a new signature.

47:25

So we have our employee signature, our supervisor's signature and now our reviewer's signature.

47:30

And so the reviewer would be the supervisor's supervisor.

47:35

So Betsy will talk to us a little bit about how that looks for the end of the year conversation.

47:41

And then finally the employee comments, same opportunity for that employee to really have a voice on how they receive the feedback within this form and or other feedback that they would like to share at that time.

47:58

OK, I'm going to bring us home with step 6, the supervisor and employee conversation.

48:05

When holding this meeting, please choose a mutually comfortable and private space and provide sufficient time for the employee to prepare and plan to participate.

48:20

For the meeting supervisors, it is important to review progress in the core responsibilities and objectives, acknowledge success, share opportunities for improvement, uncover and address any barriers.

48:36

Additionally, discussing employees career goals and or their interests let you let your employee know how you have addressed their overall performance.

48:47

But most importantly, ensure that your employee knows that you are committed to their success.

48:53

Of course, thank them for their time and for preparing for the conversation.

48:58

Employees, it is important that you come well prepared.

49:02

Bring your notes yourself, evaluation, review that you know maybe before the meeting, just to make sure you have important things top of mind.

49:13

It can be sometimes hard to remember everything that was said, so feel free to take notes as needed and just make sure that you feel welcomed and comfortable and sharing your voice in the conversation.

49:28

In HR.

49:29

We love our forms.

49:30

We also love our signatures.

49:31

So Please remember that signatures are very important.

49:35

They should be included on the employee performance plan, all of the coaching forms, the mid.

49:41

Check in, the employee self reflection and the end of year review.

49:46

If for some reason you forget to get a signature, that is OK, just put a little note on there when you do get the signature.

49:56

If for some reason the employee refuses to sign, you can just go ahead and write in Employee refuse to sign and add the date.

50:05

So moving on, we have more information for you on our Performance Management website.

50:13

This information includes the performance, life cycle and important dates.

50:18

We are working hard on developing some micro learning content for you that will be available soon.

50:25

And of course, additional supplemental forms will also be available on her website.

50:32

And finishing this portion up.

50:35

Again, our team is led by Director Charlotte itself.

50:39

Here is her contact information.

50:41

Maggie is our assistant director and Justin and I both serve as senior specialists.

50:46

We are here to support you.

50:48

Feel free to reach out again, telephone or e-mail works just fine.

50:52

So with that, we are going to let you all go and thank you again for your time this this afternoon now and hope you have a great day.