Performance Management

A briefing for new managers
GOAL BASED PERFORMANCE APPRAISALS

• Northeastern’s goal-based performance process uses the achievement of goals as the foundation of measuring performance.

• As a manager, you will work with your direct reports to:
  – Establish metrics to measure results
  – Assess key job responsibilities
  – Use skills & competencies to measure how an employee does their job
  – Create development goals for ongoing growth and development
  – Include a mid-year review/ check-in

• For New Hires
  – Set goals & expectations as part of onboarding
  – Review the annual performance process with them
  – Plan for their initial 90 day review
  – Incorporate them into the annual process going forward
THE PERFORMANCE MANAGEMENT CYCLE

Planning & Goals
- Establish annual goals
- Link to college/division goals
- Set appropriate metrics
- Clarify expectations
- Plan professional development

End of Year Evaluation
- Summarize critical goals and achievements
- Establish overall rating based on performance throughout the year

Ongoing Review, Coaching and Feedback
- Adjust goals, as needed
- Provide constructive feedback
- Ensure a mid-year discussion of performance & development
TYPICAL TIMELINE*

Goals & Metrics complete by August
Mid-year Review complete by December
Final Review complete by April

*Check with your manager for any division specific deadlines
KEY TIPS ON WRITING GOALS

• Focus on the individual’s work to ensure their actions are directed at achieving results critical to the organization’s success

• Connect the individual’s work to the goals of the department, division and Northeastern overall

• Do not encapsulate the entire job, only the key goals, projects, and accountabilities. Set 3 to 5 goals & at least one professional development goal each year.

• Typically goals start with a verb and focus on the end results

• Goals should be SMART

SMART Goals

S • Specific
M • Measurable
A • Achievable
R • Results Oriented
T • Time Bound
METRICS – DELIVERING DESIRED RESULTS

• Metrics outline the details on how results and performance will be measured.
• Typical measurements include:
  – Completion: on time, on budget, exceeded need
  – Customer: who did you reach? how received?
  – Financial: costs, savings, revenue, etc.
  – Quality: accurate, excellent, delights the customer
  – Process: creative, efficient, less steps, more automation?
DEVELOPMENT PLANNING

Development plans should be customized and integrated into the day-to-day job in order to be impactful.

• Leaders should:
  • Be engaged in the development process
  • Identify development opportunities that leverage an untapped strength or close a performance gap
  • Outline the results expected to be achieved; monitor activities and provide feedback and coaching on performance and development
  • Specify key development activities or additional support needed to promote growth and development
  • Provide a consistent message to all regarding development
FEEDBACK FRAMEWORK

• Feedback is an essential component of a performance culture
  – Most beneficial if on-going
  – Intended to support staff performance and development
  – Applies to both positive and constructive situations
  – On-going feedback ensures no surprises
• Framework assists in preparing to deliver feedback effectively

FEEDBACK FRAMEWORK©

Expectations
Observations
Consequences
Assessments
PERFORMANCE RATINGS

- **Consistently Exceeds**
  - Clearly and consistently exceeds all performance expectations

- **Frequently Exceeds**
  - Frequently exceeds performance expectations

- **Fully Meets**
  - Consistently and completely meets performances expectations

- **Partially Meets**
  - Does not consistently meet performance expectations

- **Does Not Meet**
  - Does not meet performance expectations
    - Must consult HRM – cannot be the 1st time discussing poor performance

A description of all ratings can be found on the HRM site.
SETTING SMART GOALS

• Please access the online training available on Blackboard to assist you in setting your own goals and working to set goals for your direct reports

https://blackboard.neu.edu/webapps/blackboard/execute/courseMain?course_id=_2429054_1
SELF-ASSESSMENT

• Self assessment is an effective tool in fostering greater employee engagement in the performance evaluation process

• Check out a self-study tool on Blackboard to get started!
EVALUATING & DIFFERENTIATING PERFORMANCE

• Evaluating
  – Review self-assessment
  – Review goals and outcomes
  – Evaluate results against the goals and metrics
  – Assess performance of key job responsibilities
  – Be sure to address any additional work or results:
    • This could be unplanned projects or extraordinary contributions beyond the role
  – Identify areas of development

• Differentiating
  – It’s important to clearly measure and rate the overall contribution of each member
  – It’s also important to look at the relative contribution of each member
  – Use the whole set of ratings, as needed
TOOLS & RESOURCES

• Check out the resources available to you on the HRM website or on Blackboard in HRM Learning
  – Online Training
  – Forms
  – Tips & Checklists
• HRM is here to assist you –
  – Please contact your HRM Consultant for any additional support