



Performance Management

Module 1: Performance Planning

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Imagine how you want evaluation day to go...

- http://www.youtube.com/watch?v=gdp4sPviV74&feature=BFa&list=PL37771F266160301E&lf=results_main

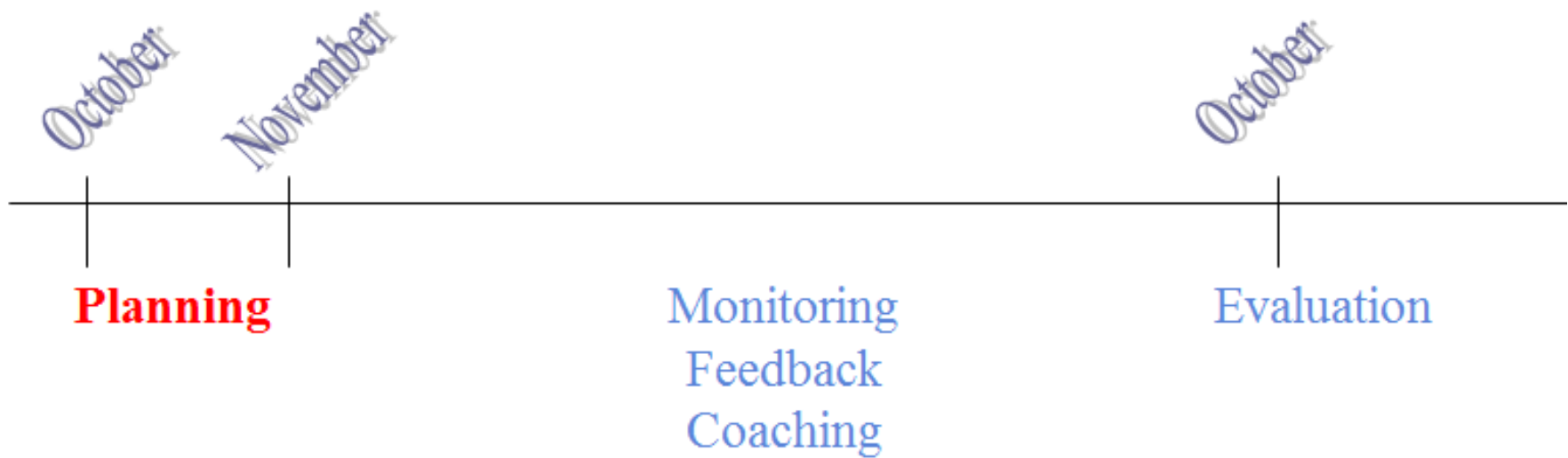


We will briefly cover how to prevent this type of situation...

- Process Overview
- Why do Performance Planning?
 - Covering multiple bases
- Completing the Performance Plan (P112)
 - Goals
 - Metrics
 - Competencies
- FAQ



VT Performance Management Cycle





Why create a PLAN?

- Contributes to the success of the department/college/organization
- Helps employees understand the importance of their job relative to the broader organizational objectives
- Builds the partnership between the supervisor & the employee
- Sets the stage for success...
 - What the employee must do to be successful
 - What supervisor must do to help employee be successful
- Simplifies performance evaluation
- Shows supervisor competence



Completing the Performance Plan

- Review/update the Position Description
- Supervisor solicits employee input
- Identify key **goals and metrics**
 - Think of the **Goals** section as **what** the employee needs to accomplish to be successful in their job
 - These **metrics** are **how** supervisors and employees will measure success
- Select appropriate **competencies** for the position
- Establish **career** development plan

Understanding the online system

- ❑ Start by going to Hokie Spa, then Hokie Team, then select “Performance Planning and Evaluation Tool”
- ❑ On the Performance Main Menu, select “Performance Plan Menu”
- ❑ On the Performance Plan Menu, select “List employees where I am defined as the supervisor”
- ❑ For each **NEW** employee (one at a time), select “View Plan”. Then select “Create/Edit Plan”. *(If you have no new employees, skip to the next step “For each EXISTING employee”.)*
 - ❑ Select “Create a New Goal”. Enter a goal and metrics for reaching the goal. Most employees have 3-5 goals.
 - ❑ Select “Continue to Competencies”. Select 3-5 competencies for your employee by clicking on the box next to the competency and it will be added to the plan.
 - ❑ Select “Continue to Career Development”. Enter items that the employee and supervisor are responsible for.
 - ❑ Select “View Performance Plan”. Review for accuracy. Once satisfied, select EITHER:
 - ❑ “Send back to employee for input”. The employee will be able to edit the plan and return it to you for approval or for further modifications. Then you can repeat the steps as many times as needed for you and the employee to be satisfied with the plan. OR
 - ❑ “Finalize and send to employee”. This is normally selected if the employee was the one who began the plan.
 - ❑ The employee must go in and approve the plan to finish the planning process.
- ❑ For each **EXISTING** employee (one at a time) select “View History”. There, you will find the prior year’s plan and you will be able to select “View Plan”. You may then select “Copy to Next Plan Year”. After that, goals & metrics, competencies, and career development plans may be edited to suit this year’s needs, added or subtracted.
 - ❑ To add a goal, Select “Create a New Goal”. Enter a goal and metrics for reaching the goal. Most employees have 3-5 goals.
 - ❑ Select “Continue to Competencies”. Select 3-5 competencies for your employee by clicking on the box next to the competency and it will be added to the plan.
 - ❑ Select “Continue to Career Development”. Enter items that the employee and supervisor are responsible for.
 - ❑ Select “View Performance Plan”. Review for accuracy. Once satisfied, select EITHER:
 - ❑ “Send back to employee for input”. The employee will be able to edit the plan and return it to you for approval or for further modifications. Then you can repeat the steps as many times as needed for you and the employee to be satisfied with the plan. OR
 - ❑ “Finalize and send to employee”. This is normally selected if the employee was the one who began the plan.
 - ❑ The employee must go in and approve the plan to finish the planning process.
- ❑ Once the planning for all employees is in the works by the supervisor, the supervisor can monitor where his/her employees are in the planning process by selecting “List employees where I am defined as the supervisor”. There, the supervisor will see under “Plan Status”, the status of each. The plan is final when the status is “Employee Approved”.



Understanding the online system

- With the number of steps, I have found it best to





Online Planning Steps with Screenshots

- http://www.hr.vt.edu/benefits/compensation/_files/file_hr_comp_performance_planning_training.pdf



At the End of the Planning Process the Employee Should Know...

- Responsibilities and Goals
- Expected Completion Dates
- What development activities are expected
- That the Supervisor is invested in and willing to assist the employee to be successful
- How individual job responsibilities and goals relate to the goals of the work unit and the university
 - (discussion between supervisor and employee)



Frequently Asked Questions

Q: Do I have to do this?

- A: *YES, according to DHRM Policy 1.40. DHRM is the Commonwealth of Virginia's Department of Human Resources Management in Richmond.*

Q: What if an employee is out on WC, VSDP, FMLA?

- A: *Wait for the employee to return to complete the performance plan.*

Q: What if an employee just transferred into my department?

- A: *Performance plans should be completed within 30 days after requesting performance information from the prior supervisor. This will save additional time at the evaluation phase of the process.*

Q: What if I have a new employee?

- A: *Performance plans should be completed within 30 days of employment.*



Contact us for assistance

Please contact me for help with performance management at:

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