

Employee Engagement through Performance Management

Presented by:

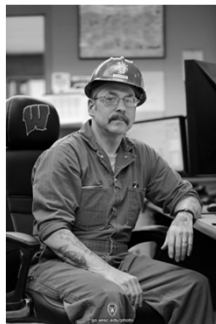
Susan Fritts, FP&M Director of Human Resources
Robert Shively, FP&M Senior Facilities Planning Specialist



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ABOUT FP&M

- Facilities Planning and Management is comprised of the Office of the Associate Vice Chancellor, Campus Planning & Landscape Architecture, Capital Planning & Development, Environmental Health & Safety, Physical Plant, Space Management Office & Transportation Services.
- UW-Madison is made up of 936-acre campus w/420 buildings w/43,338 students
- FP&M employs 1100 trades, service and professional staff



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FP&M, HR DESIGN & EID

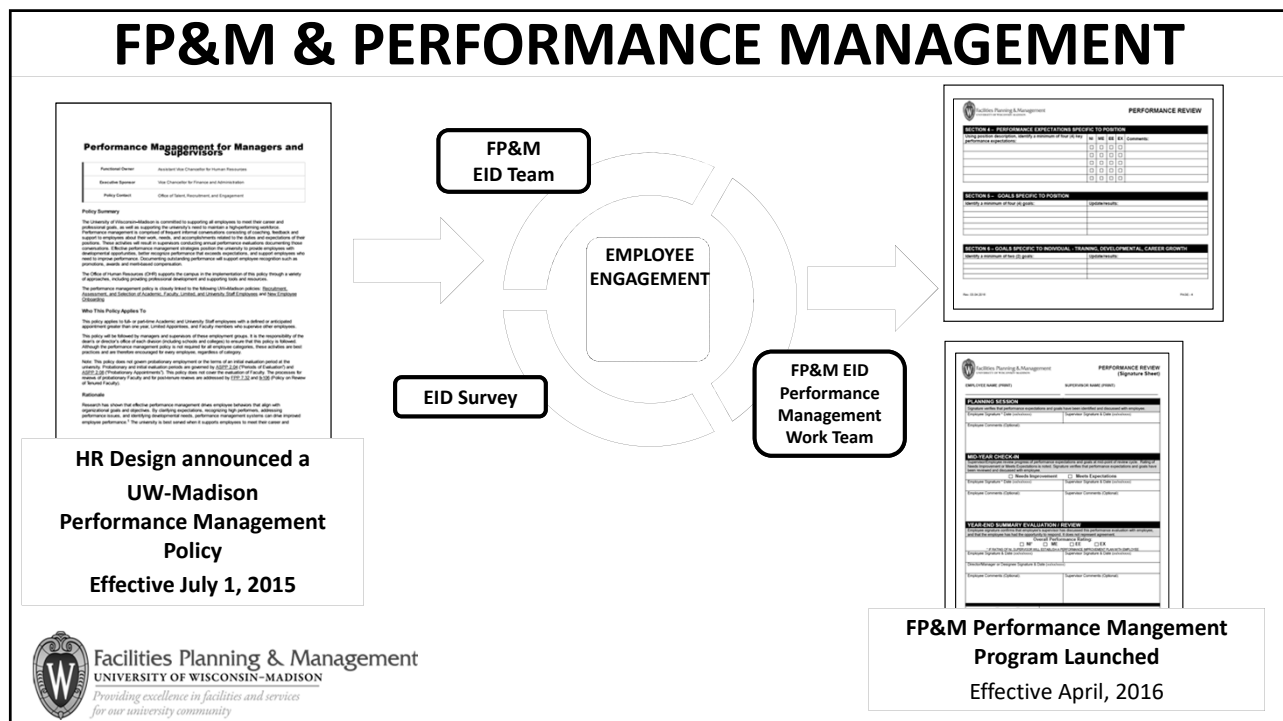
- In 2011, the State of Wisconsin presented the University of Wisconsin – Madison the opportunity to create a human resources structure that would best support the needs of a 21st century public research university. The project was named ‘HR Design’. HR Design launched in July, 2015
- In 2012, the Vice Chancellor for Finance and Administration, launched the EID (Engagement, Inclusion and Diversity) initiative. As part of the initiative, campus wide EID surveys were introduced.
- Based on EID survey results, Performance Management was identified as an EID priority for FP&M.



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FP&M & PERFORMANCE MANAGEMENT

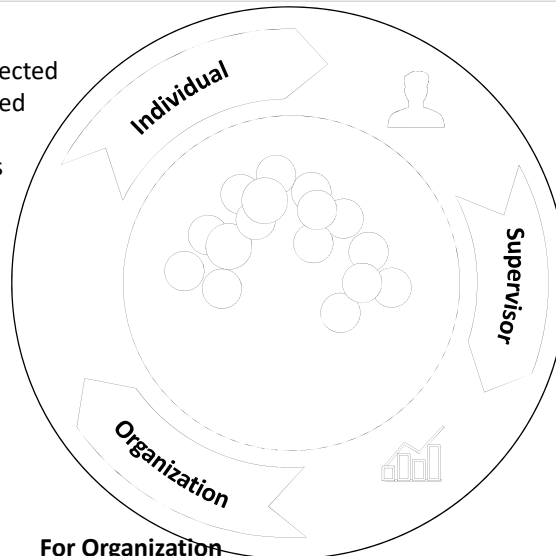


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WHY PERFORMANCE MANAGEMENT

For Individual

- Know what behaviors are expected
- Know what results are expected
- Receive formal feedback on performance based on results and observed behaviors
- Mechanism to ensure “No Surprises” at review time



For Supervisor

- Goals are aligned with the Mission, Vision and Core Values of FP&M
- Share goals with other team members
- Prepare people to meet challenges

For Organization

- Create a continuous improvement and high performance culture
- Clear accountabilities



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DIFFERENT GENERATIONS, DIFFERENT WAYS TO RECOGNIZE PERFORMANCE

- Great Depression
- World War 2
- Disciplined
- Workplace Loyalty
- Vaccines

Traditionalists

Boomers

- Vietnam, Moon Landing
- Civil/Women's Rights
- Experimental
- Innovators
- Personal Computer

- 9/11 Attacks
- Community Service
- Immediacy
- Confident, Diversity
- Google, Facebook

Millennial

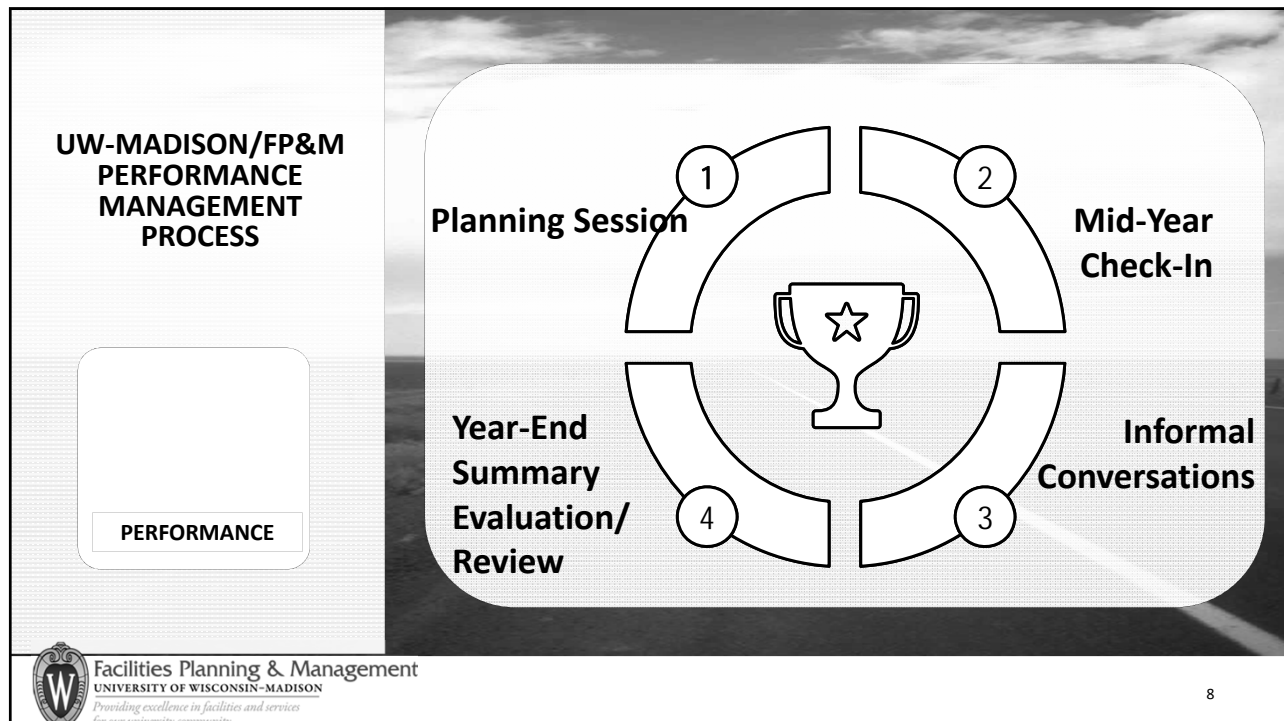
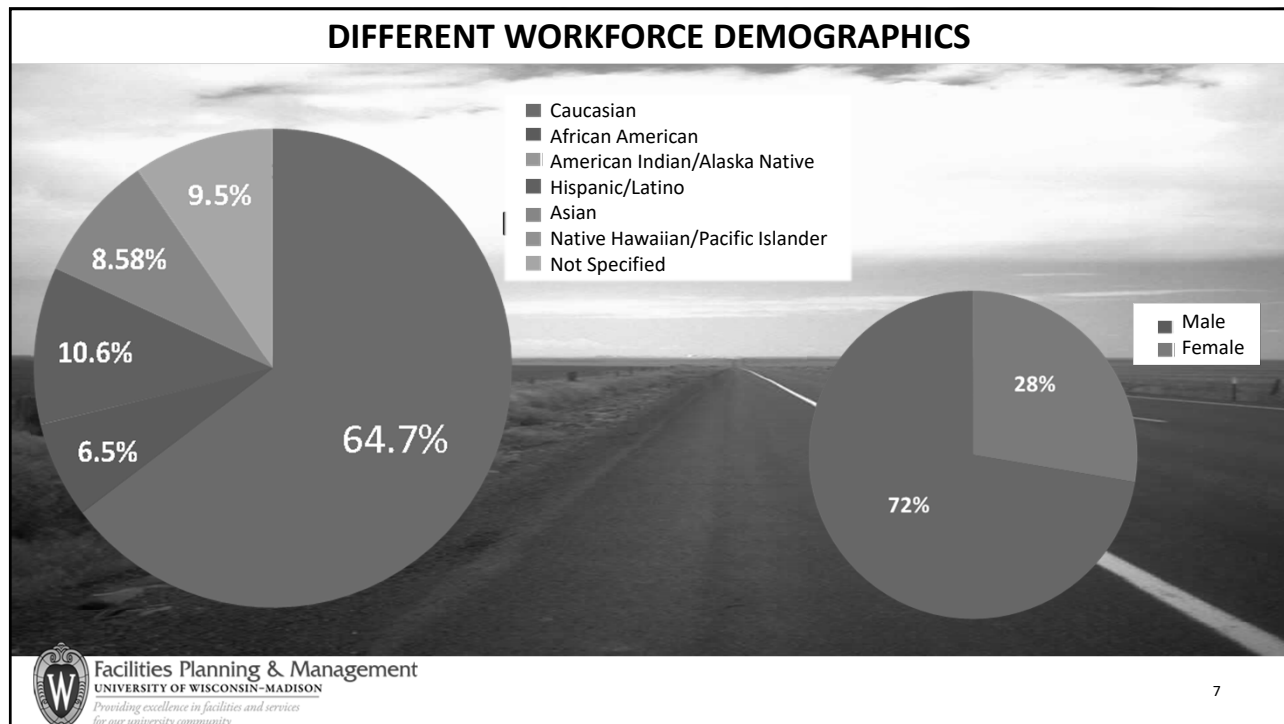
Gen X

- Fall of Berlin Wall
- Gulf War
- Independent
- Free Agents
- Mobile Phone



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One Form for Everyone

ONE STANDARDIZED FORM

One Form
for
Everyone

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Facilities Planning & Management UNIVERSITY OF WISCONSIN-MADISON		PERFORMANCE REVIEW			
EMPLOYEE NAME (Last, First, MI)	JOB TITLE	REPORTING SUPERVISOR (Last, First, MI)	REVIEW PERIOD (Start Date - End Date)	REVIEWER (Last, First, MI)	REVIEW DATE
EMPLOYEE ID	REPORTING SUPERVISOR ID	REVIEWER ID	REVIEW TYPE (Annual, Mid-Year, Special)	REVIEWER TITLE	REVIEWER SIGNATURE
SECTION 1 – PERFORMANCE EXPECTATIONS FOR ALL STAFF					
Work Performance					
• Knowledgeable in performing job duties					
• Defines, monitors and provides resources effectively and efficiently					
• Maintains effective working relationships with coworkers, supervisors and/or customers					
Communication & Working Relations					
• Acts for direction or clarification when needed					
• Displays effective listening skills					
• Demonstrates effective verbal & written communication skills					
Customer Service					
• Demonstrates politeness and follows procedures for assistance					
• Consistently performs well when working independently					
• Takes initiative to save time productively					
Customer Service					
• Treats all internal and external customers with respect					
• Manages challenging customer service situations calmly and tactfully					
Safety					
• Follows established procedures and protocols for job function at all times					
• Takes appropriate action if unsafe conditions or safety hazards arise					
• Other: (Examples of Other should be related to comments that...)					
Additional Comments					
• Demonstrates honesty and ethical behavior					
• Is willing to adjust to shifting priorities and changes in work assignments					
• Accepts responsibility for own work					
• Exhibits strong organizational skills					

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Special Projects					
OVERALL COMMENTS (required):					
SECTION 2 – JOB COMPETENCIES (Required for managers/supervisors, optional for others)					
Management					
• Provides strong and effective leadership to ensure that work unit is high performing and achieves its mission					
• Creates a positive climate by setting clear strategy goals and expectations					
• Provides regular feedback and support					
• Encourages performance					
• Supports and assists employees in learning and development					
• Fosters a welcoming and inclusive work environment					
• Develops and supports recruitment, selection and onboarding processes that contribute to workforce diversity					
OVERALL COMMENTS (optional):					

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SECTION 3 – SUPERVISOR EXPECTATIONS (required for supervisors/managers)		NI	ME	EE	EX
Acts as a Leader:					
• Coordinates the FPM's Core Values, Mission and Vision					
• Is engaging & inspiring your team					
• Is encouraging employee development					
• Ensures that you and your department know what is expected of them at work					
• Demonstrates the ability to reach time and clearly defined decisions in a timely manner					
• Coaching your employees for success					
• Directs accountability throughout Department and FPM					
Planning and Continuous Improvement:					
• Develops and implements strategic, tactical and program, policies and services					
• Develops and applies performance metrics to track and improve services. Communicates Metric results to FPM's leadership (if needed)					
Fiscal Management:					
• Demonstrates effective utilization of resources					
• Understands FPM-Madison assets					
• Implements effective financial controls, and understands security					
• Demonstrates effective job knowledge					
• Exhibits necessary professional readiness on applicable					
OVERALL COMMENTS (optional):					

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SECTION 4 – PERFORMANCE EXPECTATIONS SPECIFIC TO POSITION		NI	ME	EE	EX
Using positive description, identify a minimum of four (4) key performance expectations:					
SECTION 5 – GOALS SPECIFIC TO POSITION					
Identify a minimum of four (4) goals:					
SECTION 6 – GOALS SPECIFIC TO INDIVIDUAL - TRAINING, DEVELOPMENTAL, CAREER GROWTH					
Identify a minimum of two (2) goals:					
	</				

FOCUS ON EMPLOYEE DEVELOPMENT

- Goals for 12-month performance cycle
- Goals, development opportunities for long-term career growth

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PERFORMANCE REVIEW

SECTION 1 - PERFORMANCE EXPECTATIONS SPECIFIC TO POSITION

Using the job description, identify a minimum of four (4) key expectations:

	NI	ME	EE	EX	Comments:
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

SECTION 5 - GOALS SPECIFIC TO POSITION

Identify a minimum of four (4) goals:

	Update/results:

SECTION 6 - GOALS SPECIFIC TO INDIVIDUAL - TRAINING, DEVELOPMENTAL, CAREER GROWTH

Identify a minimum of two (2) goals:

	Update/results:

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THE WHAT PORTION OF PERFORMANCE

Set goals specific to position or individual for the upcoming year

- ☒ Use SMART goals if possible
- ☒ Goals should be...
 - ✓ Tied to departmental priorities
 - ✓ Employee specific (supervisor – employee conversations)
 - ✓ To push employees to grow themselves – to help excel outside of their regular activities

WHAT

Individual goals should NOT be:

- ☒ Duplicate of job description
- ☒ Personal to do list
- ☒ Out of person's control

THE WHAT PORTION OF PERFORMANCE

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PERFORMANCE REVIEW

SECTION 4 – PERFORMANCE EXPECTATIONS SPECIFIC TO POSITION
Position description, identify a minimum of four (4) key expectations:

	NI	ME	EE	EX	Comments:
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	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
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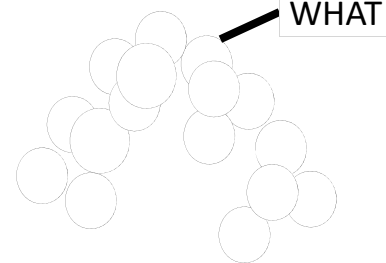
SECTION 5 – GOALS SPECIFIC TO POSITION
Identify a minimum of four (4) goals:

	Update/results:

SECTION 6 – GOALS SPECIFIC TO INDIVIDUAL - TRAINING, DEVELOPMENTAL, CAREER GROWTH
Identify a minimum of two (2) goals:

	Update/results:

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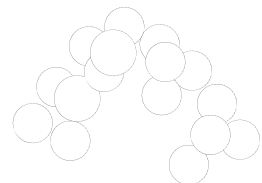


THE WHAT PORTION OF PERFORMANCE

S	M	A	R	T
Specific	Measurable	Achievable	Relevant	Time-Sensitive

- ☛ **Specific:** Tell precisely what employees want to accomplish (Who, What, Where, Why).
- ☛ **Measurable:** Tell employees how the results will be measured.
- ☛ **Achievable:** Offer employees a challenge. Is there a reasonable chance they can meet this challenge? What is the action verb?
- ☛ **Relevant:** Help support the organizational goals. Do employees possess the knowledge, skills, abilities and support to complete this?
- ☛ **Time-Sensitive:** Set 1 or more target dates, the "by when" to complete the goal.

WHAT



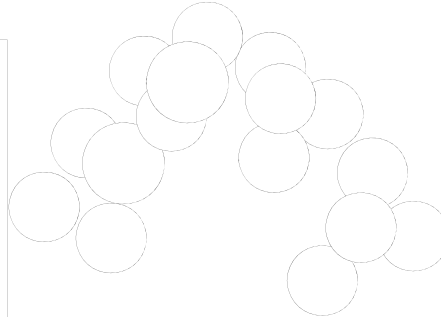
THE HOW PORTION OF PERFORMANCE

1. Core Values = “HOW” portion of performance

2. Performance is not just “WHAT” you accomplish, but also “HOW” you behave

☒ Was the employee’s behavior tied to FP&M and/or departmental priorities?

☒ Think of an employee who truly represents FP&M’s Mission, Vision and Core Values



HOW



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THE HOW PORTION OF PERFORMANCE



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PERFORMANCE REVIEW

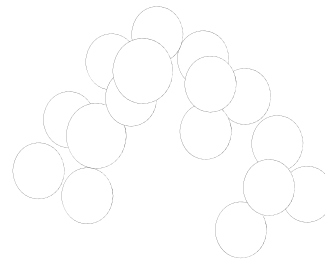
EMPLOYEE NAME (Last, First, MI)		JOB TITLE	EMPLOYING UNIT (Division and/or Work Unit)	REVIEW COMPLETED BY
EMPLOYEE ID	REPORT PERIOD (MONTH/YEAR) FROM TO	POSITION DESCRIPTION <input type="checkbox"/> Is Up To Date <input type="checkbox"/> Needs Revision	TYPE OF POSITION (check all that apply): <input type="checkbox"/> Academic <input type="checkbox"/> University <input type="checkbox"/> Limited Appointment <input type="checkbox"/> Student Hourly <input type="checkbox"/> Temporary (S/T) <input type="checkbox"/> Supervisory <input type="checkbox"/> Non-Supervisory	

SECTION 1 – PERFORMANCE EXPECTATIONS FOR ALL STAFF

	NI	ME	EE	EX
Work Performance • Knowledgeable in performing job duties. • Applies knowledge and available resources effectively and efficiently. • Performs work assignments accurately and according to professional standards.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication & Working Relations • Maintains effective working relationship with coworkers, supervisors and/or customers. • Asks for direction or clarification when needed. • Displays effective listening skills. • Assist co-workers when appropriate. • Demonstrates effective verbal & written communication skills.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dependability • Demonstrates punctuality and follows procedure for absences. • Consistently performs well while working independently. • Takes initiative to use time productively.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer Service • Relates work and job purpose and commitment to customers. • Treats all internal and external customers with respect. • Manages challenging customer service situations calmly and tactfully.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Safety • Follows established procedures and protocols for job function at all times. • Takes appropriate action if unsafe conditions or safety hazards arise. • Other: (Examples of Other should be noted in comments box)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accountability • Demonstrates honesty and ethical behavior. • Is willing to adjust to shifting priorities and changes in work assignments. • Accepts responsibility for own work. • Follows through on commitments.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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HOW



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THE HOW PORTION OF PERFORMANCE

SECTION 2 – EID COMPETENCIES

(Required for managers/supervisors, optional for others)

Engagement

- Provides strong and effective leadership to ensure that work unit is high performing and achieves its mission.
- Creates a positive climate by setting clear strategy goals and expectations.
- Honors FP&M and Department core values.
- Provides regular feedback and support.
- Rewards performance.
- Supports and assists employees in learning and development.

Inclusion

- Fosters a welcoming and inclusive work environment.

Diversity

- Creates and supports recruitment, selection and onboarding processes that contribute to workforce diversity.

OVERALL COMMENTS (required):

NI ME EE EX

NI = Needs Improvement

ME = Meets Expectations

EE = Exceeds Expectations

EX = Exceptional

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THE HOW PORTION OF PERFORMANCE



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PERFORMANCE REVIEW

SECTION 3 – SUPERVISOR EXPECTATIONS (Required for supervisors/managers)

Acts as a Leader:

- Demonstrates the FP&M's Core Values, Mission and Vision
 - By engaging & inspiring your team.
 - By encouraging employee development.
 - By ensuring each individual within department knows what is expected of them at work.
- Demonstrates the ability to reach firm and clearly defined decisions in a timely manner.
- Coaching your employees for success.
- Drives accountability throughout Department and FP&M.

Planning and Continuous Improvement:

- Demonstrates ability to plan and prepare administrative unit programs, activities and services.
- Develops and applies performance metrics to track and improve services. Communicates Metric results to FP&M Leadership Team, Department and others as needed.

Fiscal Management:

- Demonstrates efficient & effective utilization of resources.
- Safeguards UW-Madison assets.
- Implements effective internal controls, and software/data security.

Professional Expertise:

- Demonstrates effective job knowledge.
- Stays current with trends and/or research in field.
- Maintains necessary professional credentials as applicable.

OVERALL COMMENTS (required):

NI ME EE EX

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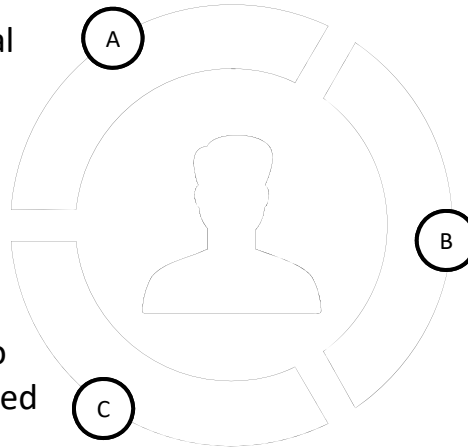
HOW

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THE SPIRIT OF INFORMAL CONVERSATIONS

Conduct regular informal conversations with each employee who directly reports to you

Informal conversations do not need to be documented



Focus on coaching

Provide feedback and support to employees about their work, needs and accomplishments related to the duties and expectations



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SUMMARY

70-20-10-RULE

We learned the importance of...

- 🧠 **Cross-Functional Team Approach**
- 🧠 **Enhancing employee engagement**
- 🧠 **Elements of performance review**
- 🧠 **Ways to have conversations**



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