

Performance Matters

Combining a standardized performance evaluation tool and clear employee expectations to drive a culture of accountability in state government



March 2014

Key Dates:

April

Submit agencywide expectations to the DMS People First team

June

Notifications sent to alert managers to begin completing evaluations ending June 30 and notifications sent to alert managers to set expectations for the July 2014 - June 2015 evaluation cycle

June 30

Closing date for the Jan. 1 – June 30, 2014 evaluation cycle

July 1

Evaluations opened in the People First system for the July 1, 2014 – June 30, 2015 cycle

Aug. 29

Final day to complete performance evaluations for the Jan. 1 – June 30, 2014 cycle

Resources:

We encourage employees, managers and human resource professionals to frequently visit the [Performance Matters Initiative Web page](#).

It offers valuable resources and updates - including the [Performance Matters Initiative Toolkit](#) and [samples of performance expectations](#) - to aid managers in the development of SMART expectations and the use of the online performance evaluation module.

Performance Matters Update - March

Now that agencies are well into this evaluation period, it is a critical time for managers to ensure they are successfully implementing the Performance Matters methodology by monitoring and coaching employee performance. In addition, managers should be looking toward the end of the evaluation period in June, when they will need to evaluate employees based on their level of performance, as compared to the pre-established measurements. The new methodology involves a four-step process of: implementing SMART expectations, monitoring performance, reviewing measurements and expectations, and readjusting them as necessary.

Implementing SMART Expectations

Managers were required to set SMART expectations for all employees for the Jan 1 - June 30, 2014, evaluation period. By now, all employees should have received, reviewed and acknowledged these new SMART expectations.

Agencies should make SMART methodology training available for new managers. This training should emphasize how to set specific, measurable performance expectations tailored to the employee's daily tasks and performance goals. It is a great practice to share SMART expectation examples within your agency, share timelines to keep managers on track, and continue to offer assistance writing expectations so managers can prepare for the setting of expectations for the July 2014 - June 2015 evaluation period.

Monitor

During this stage in the evaluation period, managers are monitoring employee performance according to the expectations set on Jan. 1. Managers should now have measurement procedures in place that allow them to evaluate employee performance based on specific criteria. The Performance & Talent Management module in the People First system provides managers with a "Manager's Notepad" to track employee progress throughout the evaluation period.

Review

As managers document employee performance, conducting quarterly spot checks can help gauge the effectiveness of the expectations and measures. It is a good idea to consider the following questions:

- Have you reviewed your expectations recently?
- Are the expectations encouraging the outcomes you had hoped?
- How effective and practical are the procedures you're using to measure employee performance?
- Have you spoken with the employee for whom you set expectations? Does he or she still agree they are reasonable and achievable?
- Does the employee feel he or she has a good sense of how their performance is being monitored?
- Do the current scores accurately reflect the employee's performance level?

Adjust

Between now and June, the evaluation process will reveal aspects of the original SMART expectations that may need reassessing and adjusting. This does not indicate any sort of failure, but should be viewed as a natural progression and an intrinsic part of the performance management process. If a manager determines that newly established expectations could be more effective or if job duties require a change, then changing expectations or what is measured should be considered.

Some helpful questions when considering how to recalibrate a performance expectation include:

- Did you set the expectation with a preset idea that it could not be fully mastered? (Remember: a 3 is successful and a 5, although difficult to sustain, is achievable.)
- Are the reports or methods of measuring this expectation resulting in an overly burdensome workload? Are they incapable of providing the expected information?

Additional guidance on how and when to tweak an expectation will be provided in future communications.