

Welcome to Shark Performance Management Training.

Today's training session is designed to provide you with:

- An understanding of why performance management is so important at NSU
- Information on the annual process and what you need to do, and
- Tools to enhance your performance management capabilities.

## What is the number one job satisfier?...

**Pay**

**Job Security**

**Communication  
between employees and  
senior leadership**

**Relationship  
with  
supervisor**

**Opportunities  
to use  
skills/abilities**

2

Based on a number of years of research by the Society of Human Resource Management (SHRM) and others, these are five top factors contributing to an employee's job satisfaction.

So, the question is... which factor is tops? Which one is the most influential factor of these five? Which one is number one? What would you say?

The answer is... (next slide)

What is the number one job satisfier?...

Pay

Job Security

Communication  
between employees and  
senior leadership

Relationship  
with  
supervisor

**Opportunities  
to use  
skills/abilities**

3

... "Opportunities to use skills/abilities." So, it's really important to employees to have the feeling of using what she or he is good at. And the more my work environment and the way my work is structured to allow me to use what I see as my skills and abilities, the more satisfied I can be in my job.

Now let's look at a slightly different measure... (next slide)

What is the number one factor contributing to engagement?...



## Relationship with co-workers

I am determined to accomplish my work goals and confident I can meet them

Contribution of my work to organization's goals

Relationship with supervisor

Opportunities to use skills/abilities

4

This time we're looking at employee **engagement**. Now, what is engagement? It is the extent to which I'm willing to extend my WILL, my emotional energy, into my work day in and day out. And again, from research, here are five factors that surface as most contributing to employee engagement, but one of these is the top factor. There's overlap here in this list and with the job satisfaction list. They are all important, but which factor do you think is number one? (next slide)

What is the number one factor contributing to engagement?...



**Relationship with co-workers**

**I am determined to accomplish my work goals and confident I can meet them**

Contribution of my work to organization's goals

Relationship with supervisor

Opportunities to use skills/abilities

5

Interestingly, it's this one.

So the reason we go to all this effort to complete the performance review process is that people's performance goals matter to them. Having the feeling of accomplishing goals, of moving forward, of making progress matters to us. And we can help people experience greater job satisfaction and help people make the effort to engage in their work more effectively if we all join in making the performance management process work.

**Fair and equitable**

**Consistently applied**

**Simple and easy to use**

Performance Management at NSU is designed to be:

Fair and Equitable

Consistently applied

Simple and easy to use.

# Agenda



1. Welcome, Purpose and Introductions

2. Improvements from Task Force and Project Team

3. Timeline for the Annual Performance Review Process

4. Eight "To-Do's" for Review Process Success

5. Broadcast Communication to Employees and Supervisors

6. Training Available

**1. One review template for all employment types**

**2. Shorter sections**

**3. A much shorter timeline**



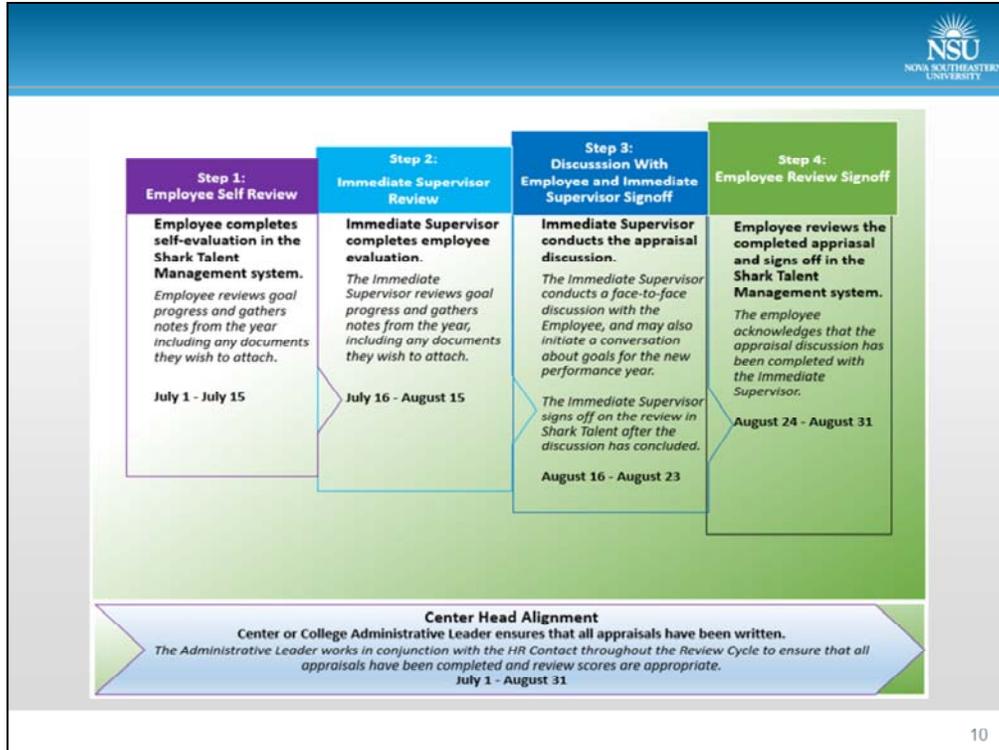
**I am determined to accomplish my work goals and confident I can meet them**

**Recognition for goal accomplishment  
(summer)**

**Start of new academic year/enrollment confirmation.  
(fall)**

**Award of merit increases.  
(winter)**

We complete the employee and supervisor performance reviews in the summer so that, if there's sufficient funding available, merit increases can then be awarded in the winter. Those performers who excel receive merit rewards if funding allows, so we create stronger links between individual performance achievement and overall institutional success when we are able to award exceptional achievers following their formal review.



This is the NSU Annual Performance Review Timeline:

Each Employee is expected to have performance goals, or updated performance goals, in the Shark Talent Management system by June 15th.

Each Manager is expected to have approved the employees goals on or before June 30<sup>th</sup>.

Each manager completes the employee evaluation in the Shark Talent Management system by August 15th.

Then, during the week of August 16 through 23, the manager schedules a formal one-on-one performance discussion with each Employee that reports to them. If an employee has changed positions or changed supervisors during the fiscal year, then the current supervisor will conduct the review obtaining feedback from the previous supervisor. If the previous supervisor is no longer with the University, the current supervisor should consult with other supervisory staff that have worked closely with the employee to assist in filling out the evaluation.

During the week of August 24 through 31, the employee reviews the completed appraisal and signs-off in the Shark Talent Management System to acknowledge that the discussion with the immediate supervisor has been completed.

On July 1<sup>st</sup>, the new performance year begins. The employee enters or updates goals in the Shark Talent Management system at any time during the new performance year and submits these to the immediate supervisor for approval.

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## Eight “To-Do’s” for Review Process Success



1. Check to be sure that reporting relationships are correct in the Shark Talent Management system.

2. Ensure that nonexempt employees carry forward last year's tasks goals with a June 30 end date. Reclassified non-exempts don't have task goals, so the manager will need to create goals for these transitioned staff.

3. Assist supervisors with assigning co-planners for transferred employees.

4. For employees or supervisors on leave – complete review as soon as feasible.

## Eight “To-Do’s” for Review Process Success



5. Explain the People Manager goal for supervisors.

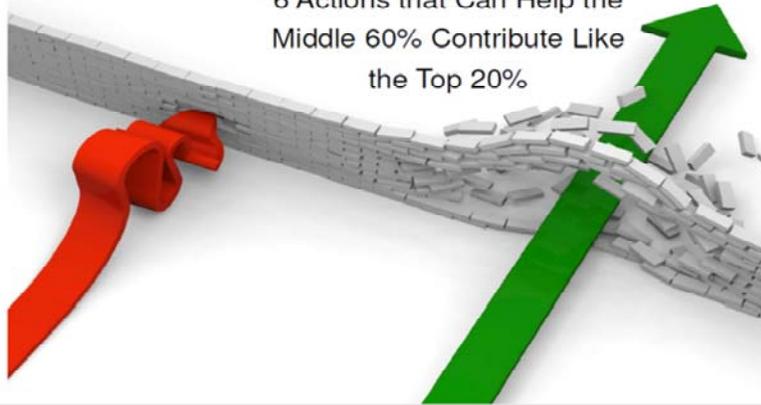
6. Assist supervisors with understanding how to handle employee comments.

7. Understand the weighting of goals and the overall rating.

8. Coach others on difficult conversations.

## Implications for Action

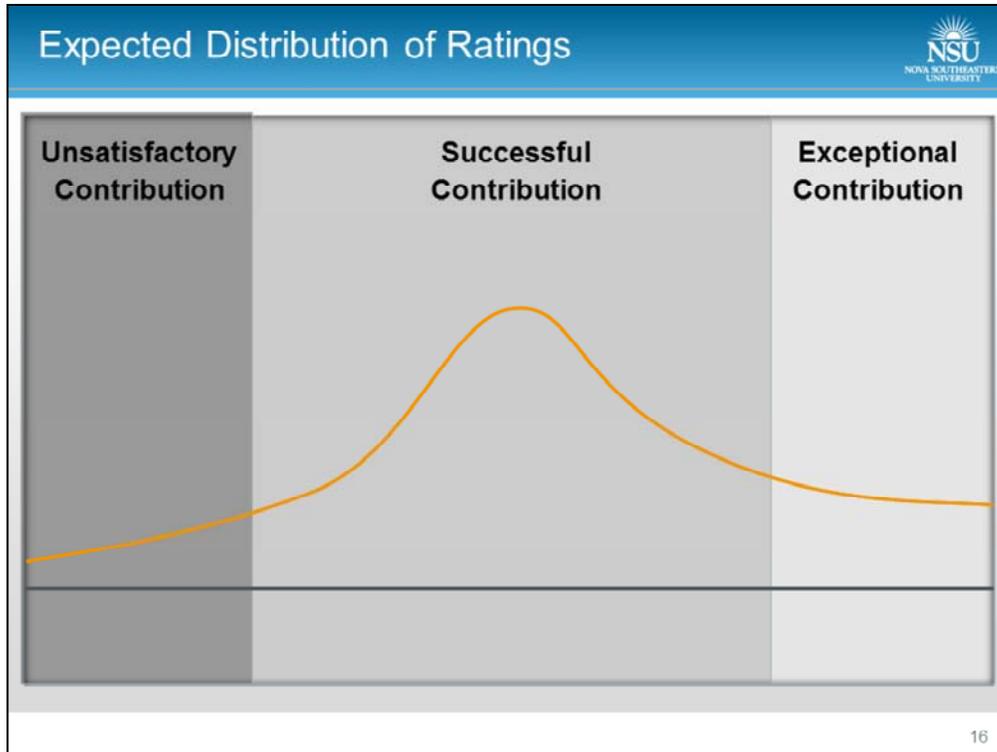
6 Actions that Can Help the  
Middle 60% Contribute Like  
the Top 20%



## *“6 for 60”*

1. Establishing Clear & Well-Aligned Goals
2. Addressing Differences in How Goals are to be Achieved
3. Advocating for Needed Resources & Abilities
4. Admitting Mistakes to Advance Problem Solving
5. Resolving Dilemmas
6. Coaching Accountable Action

<http://www.advisory.com/talent-development/leader-development/multimedia/have-you-mastered-the-politics-of-change>



Employee Performance is rated using a three-category rating scale rather than a numerical value.

NSU generally expects:

- A **majority of its Employees should be in the “Successful Contribution”** category;
- A **small group, if any, of its Employees, may be in the “Unsatisfactory Contribution”** category;
- **Up to 30% of its Employees may be recognized as truly high performers in the “Exceptional Contribution”** category.
- All employees to “stretch”, meaning that NSU’s standards are challenging, yet achievable.

This expected distribution of Employee Performance is guided, not forced, which means that Managers are not tasked with identifying a certain percentage of Employees to be in the bottom category or the top category. Rather, it is guided to allow Managers to truly identify Employees who go above and beyond in performance.

# Performance Rating Scale



**What is the performance rating scale?**

There are three possible ratings for each goal or task goal. These are outlined below:

Rating	Performance Description
Exceptional Contribution	Frequently exceeded expectations. Employee was an exceptional contributor to the success of his/her department and NSU. He/she demonstrated role model behaviors.
Successful Contribution	Consistently met expectations and may occasionally exceed expectations. Employee was a solid contributor to the success of his/her department and NSU.
Unsatisfactory Contribution	Delivers inconsistent contributions. Improvement is needed to accomplish expected results. If the overall performance rating is Unsatisfactory Contribution, the employee should be placed on a Performance Improvement Plan with a follow-up review occurring as specified by the supervisor.

# What performance matters at NSU?



Career Level	Core Values	Goals and Responsibilities
 People Managers	25%	Goals and Responsibilities 75%
 Professional	25%	Goals and Responsibilities 75%
 Technical / Associate	25%	Goals and Responsibilities 75%

# Weightings and Ratings

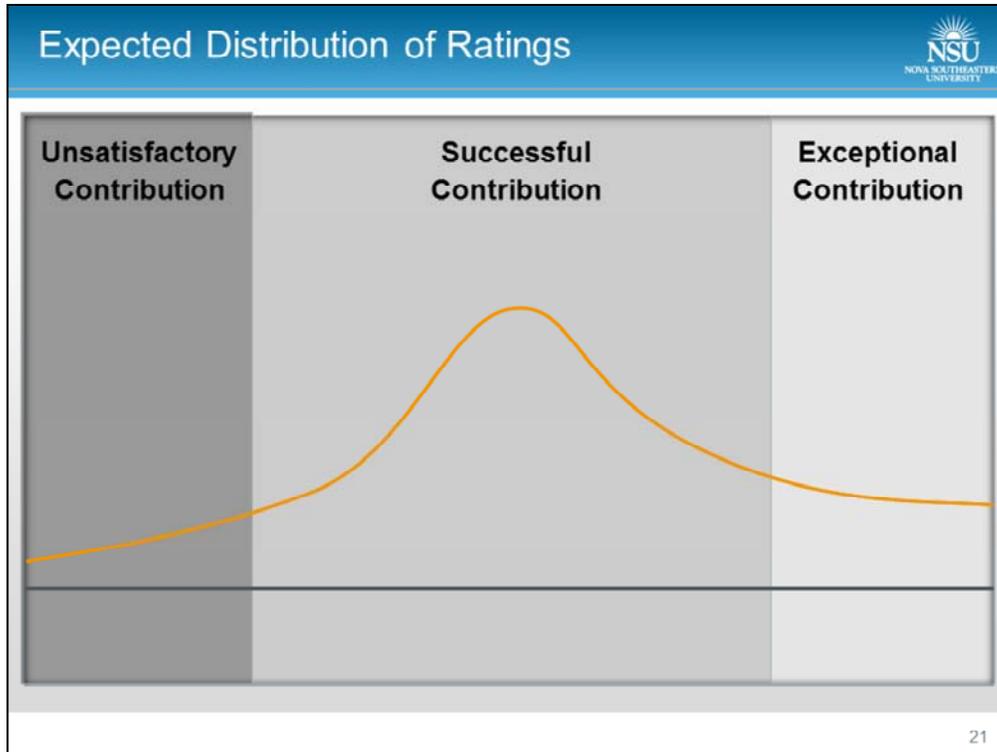


## ***How are weightings and ratings related?***

There are two sections to the new performance review that will comprise the Overall Score of each employee's review:

<p><b>Section 1: Goals &amp; Responsibilities</b></p> <p>75% of Total</p>	<p><b>2 Parts:</b></p> <p><b>Part A)</b> i. Goals created and approved for the current review period ii. Managers will be also assigned a separate People Manager goal;</p> <p><b>Part B)</b> i. One question regarding the Immediate Supervisor's overall assessment of the employee's behaviors and responsibilities</p>	<p>Part A is 50% of the Section Score</p> <p>Part B is 50% of the Section Score</p>	<p>Section Score comprises 75% of Overall Review Score</p>
<p><b>Section 2: Core Values</b></p> <p>25% of Total</p>	<p>1 part: 8 specific NSU Core Values</p>		<p>Section Score comprises 25% of Overall Review Score</p>

<u>Weighting on Goals Page</u>	<u>Weighting in Performance Review</u>
Goal 1 25%	16.67%
Goal 2 25%	16.67%
Goal 3 25%	16.67%
Goal 4 25%	16.66%
People Manager Goal 50%	33.33%
Total 150%	100%



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## Eight “To-Do’s” for Review Process Success



5. Explain the People goal for supervisors.

6. Assist supervisors with understanding how to handle employee comments.

7. Understand the weighting of goals and the overall rating.

8. Coach others on difficult conversations.

<https://www.youtube.com/watch?v=stihjalAflk>



NSU has three Manager-Employee meetings associated with each performance year.

Two are longer meetings and one is a shorter meeting.

Manager - Employee meetings provide multiple formal occasions to confirm performance expectations and provide feedback. For the process to be effective, each Manager and each Employee must commit to, and be engaged in, each of these discussions.

The first long meeting is the Performance Discussion which occurs in the July-August timeframe. This is a one-on-one meeting between the Manager and Employee to cover a “look back” to evaluate the past performance year, and a “look forward” to discuss expectations for the coming performance year.

The second long meeting is a Mid-year Review Discussion between the Manager and Employee and should occur in the January – February timeframe. This meeting is a time to provide formal feedback regarding the Employee’s performance to date, and to adjust the annual goals, if needed.

The short meeting occurs in the month of November following the close of the performance year. This meeting is for the Manager to communicate any relevant compensation changes to the Employee. All compensation adjustments are based on the University’s availability of funds, which are impacted by

student enrollment numbers, research endowments and other business factors.

## Conducting the Performance Discussion



Private location

Key messages & discussion

Allow 60 minutes

### Meeting Agenda

- Review performance expectations
- Discuss progress
- Confirm if anything needs to change
- Ensure availability of resources; agree to follow-up if changes occur

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Similar to the annual performance discussion, the Manager has a formal, mid-year, one-on-one performance discussion meeting in the December - January timeframe, with each Employee reporting to her or him.

The focus of this meeting is to confirm the Employee's performance expectations, and to note any changes to goals set during the initial performance discussion in the July – August timeframe.

The Employee and the Manager should set aside approximately one hour for this discussion. The location should be private and free from distractions, such as cell phone and e-mail interruptions.

The Manager provides feedback about the Employee's performance, with specific examples of how the Employee is, or is not, demonstrating expected performance.

The Manager recommends one or two areas to the Employee, to develop and strengthen performance over the coming months.

The Employee provides results of progress to goals and identify what, if anything, is needed to accomplish the goals.

In the mid-year discussion, one of the most important things an Employee can do is to listen to the feedback that the Manager provides to improve the Employee's performance.

Be courageous! If the Manager does not provide the Employee any areas to improve or develop, ask! Even top performers have room for improvements in performance.

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NOVA SOUTHEASTERN UNIVERSITY  
**Shark Talent Management Suite**  
LEARNING • PERFORMANCE • CAREER

Home New T's and F's Learning Performance Succession Reports My Team Admin

Welcome, Mark, to Shark Talent Management!

**Performance Management Goals Training**  
Shark Performance Management Goals Training is now available online!  
To access this training [click here.](#)

**My Tasks**  
No current tasks in progress

**Actions Needed**

**Browse For Training**

- Required Training
- Leadership Development
- New Hire
- Supervisory Development
- Productivity Training
- Communication Skills
- Work/Life Balance

Apr		May 2015					Jun	
MON	TUE	WED	THUR	FRI	SAT	SUN	MON	
26	27	28	29	30	1	2		
3	4	5	6	7	8	9		
10	11	12	13	14	15	16		
17	18	19	20	21	22	23		
24	25	26	27	28	29	30		
21	1	2	3	4	5	6		

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# *Shark Performance Management Program*

GOALS • VALUES • RECOGNITION

Overview of the Annual Performance Goal Setting and Review Process for HR Contacts