EHRA Performance 2016-2017

Evaluation Type: Focal
Program Timeframe: 06/08/16 to -
Co-reviewer:

Review Status: Open
Last Updated: September 27, 2016 13:12
Last Completed Employee Acknowledges
Step: Performance Plan

Plan for Test Employee

Introduction

Performance management is more than a regulatory requirement, it is the systematic process of:
• planning and setting goals,
• monitoring performance and providing continuous feedback,
• developing employees' capacity to perform successfully,
• and periodically evaluating performance.
Goal setting is the foundation of the yearly performance cycle. Effective goals align the employee's behavior with organizational needs and objectives. Goals should be specific, unambiguous to the employee, and within the employee's control to attain. Overall, they should be designed to help your employee succeed.
When discussing goals with your employee make sure they know what their job duties are, how to successfully perform those duties, as well as how their performance will be measured and rated.
Please update your employee's position description prior to setting goals. Instructions for updating a position are located on the "Individual Goals" tab.

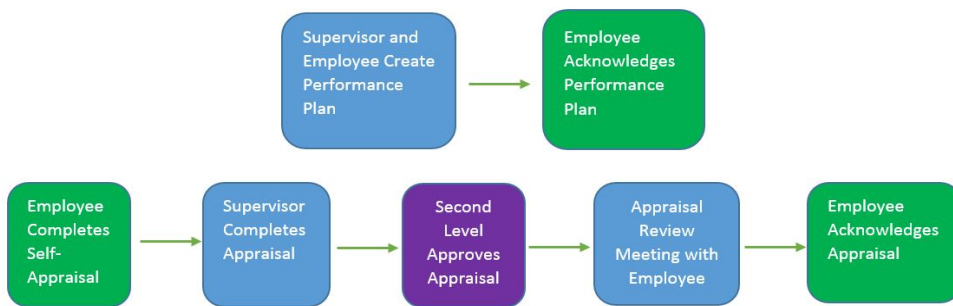**Click here for the EHRA Performance Management User Guide.**

Workflow and Schedule

Approvers Workflow

Blue: Supervisor
Green: Employee
Purple: Second Level

The yearly performance cycle runs from April 1st to March 31st of the following year.
Tasks will open on the following schedule:

- **April 1st, 2016:** Performance Plan Creation Begin.

- **September 30th, 2016:** All EHRA Employees should have an acknowledged performance plan in place.

- **September 30th, 2016-March 31st, 2017:** Feedback and Coaching occurs during this time.

- **At anytime during the cycle** , the supervisor can use the off-cycle review form to document performance related discussions with the employee or request peer feedback.

- **March 1st-31st, 2017:** Employees complete their self-appraisal.

- **March 31st, 2017:** End of performance cycle.

- **April 1st-May 15th, 2017:** Supervisors complete the annual performance appraisal. This appraisal is forwarded to the Second Level Supervisor for approval. Once this approval is received, the supervisor will set the appraisal meeting. Once the meeting is

complete, employees will receive notification to acknowledge their appraisal.

- **May 30th, 2017:** All EHRA employees should have an acknowledged performance appraisal.

Components

The essential components of the performance cycle are:

I. **Individual Goals:** Key performance expectations, projects, or tasks identified by the employee and manager based on the employee's job description. (In order to use the position description for goal setting, it must be updated.

II. **Organizational Goals:** Goals crafted using competencies that are essential for the employee and/or department. These can be the same for all employees in your department or unique for each employee.

III. **Career Development Plan:** When there is a business need for an employee's professional development, the manager/supervisor will include a career development plan in the annual performance appraisal document.

IV. **Rating:** At the end of the cycle, each goal will be rated based on the rating scale provided. These ratings will be averaged (based on their weight) for an overall rating.

Rating Scale

1. **Not Meeting Expectations:** Employee often performs below the level defined in the performance plan in terms of quantity, quality, timeliness, cost, and customer satisfaction due to the employee's lack of effort or skills. Employee has a performance deficiency(ies) that have not improved after receiving corrective feedback by the manager/supervisor, and/or increased oversight is required to ensure work is being accomplished.

2. **Meeting Expectations:** Employee generally performs at the level defined in the performance plan in terms of quantity, quality, timeliness, cost, and customer satisfaction due to the employee's own effort and skills. Employee is responsive to guidance and feedback from the supervisor such that only moderate oversight is required to ensure sufficient work is being accomplished.

3. **Exceeding Expectations:** Employee consistently exceeds the level defined in the performance plan in terms of quantity, quality, timeliness, cost, and customer satisfaction due to employee's own effort and skills. Employee's work performance is consistently characterized by exceptionally high quality work accomplished with minimal oversight.

Individual Goals

**Using your employee's position description, work together to set individual goals below. To access the position description, hover over the employee's job title in the upper left hand side of the screen under their name. Clicking on the job title will open the position description in a separate window.

****

PLEASE UPDATE YOUR EMPLOYEE'S POSITION DESCRIPTION PRIOR TO SETTING INDIVIDUAL GOALS.

****

In the fields below:

1. Set at least 3, but not more than 5, individual goals for your employee.

2. Add a description and weight for each goal.

3. Select "Add Entry" to add another goal field.

Individual Goal Name

Policies & Procedutes

Individual Goal Description

1. Update the Eligibility Manual to reflect current policies and procedures
2. Implement Eligibility Overview checklist and train other advisors to use to help keep track of their caseload's eligibility as another layer of accountability

Weight

25

Individual Goal Name

Advising Caseload

Individual Goal Description

1. Assume advising caseload of approximately 20 students
2. Assist Director with future caseload assignments and distribution

Weight

20

Individual Goal Name

Technology

Individual Goal Description

1. Update academic curriculum labels in appropriate software
2. Begin using Google calendar for appointment management
3. Become familiar with use of OneNote software

Weight

20

Organizational Values Goal

All ASU Staff (EHRA Non-Faculty and SHRA) will have this goal in their performance plan. The weight for this goal should be set at **no less than 5%.**
I will contribute positively to the work environment through positive interactions with others.
For Supervisors: I will maintain a safe and productive work environment for all employees.

Weight

5

Organizational Goals

**Using your employee's position description, work together to set individual goals below. To access the position description, hover over the employee's job title in the upper left hand side of the screen under their name. Clicking on the job title will open the position description in a separate window.
****
PLEASE UPDATE YOUR EMPLOYEE'S POSITION DESCRIPTION PRIOR TO SETTING INDIVIDUAL GOALS.
****

Using selections from the drop down menu, choose an organizational competency. You may also choose "other" if your desired competency is not on the list.
Click HERE to access the full EHRA Competency Guide with descriptions and definitions.

In the fields below:

1. Choose at least 3, but not more than 6, organizational competencies from the drop down menu and set goals for your employee.

2. Add a description and weight for each goal.

3. Select "Add Entry" to add another goal field.

Organizational Goal

Collaboration/Team Work

Description

The level of success we achieve is dependent on our ability to work together. Each member of our team possesses unique talents and knowledge. If the talent and knowledge isn't shared, we don't learn, develop, or grow. Thus, we remain stagnant and if stagnant long enough we begin to decline. Care with Candor are imperative if we desire to improve. During the academic year we will improve collaboration by implementing a "team of teams" mindset.
Key Actions: Network – Take time to establish relationships inside and outside the department, building a mutual connection. Exchange – Make others feel respected and heard; promote the positive exchange of ideas; offer venues for others to be involved in discussions; acknowledges the contribution of others.
Weight

10

Organizational Goal

Innovation

Description

2016-2017 theme is "Embrace our Evolution". One question great organizations always ask themselves is, "is this the best we can do"? During 2016-2017 I ask team members to challenge the status quo, think big, and embrace our evolution. Staff will be expected to generate ideas for improvement
Key Actions: Challenge – Identify implicit assumptions in the way problems or situations are defined or presented; see alternative ways to view or define problems; is not constrained by the thoughts or approaches of others. Expand – Combine ideas in unique ways or make connections between disparate ideas; explore different lines of thought; view situations from multiple perspectives; brainstorm multiple approaches/solutions.

Weight

10

Organizational Goal

Leading/Living The Vision And Values

Description

Our reputation will be based more on what we do; versus what we say. Team members should remain self-aware and cognizant of how actions contribute to the environment and identity of our department. What message do we communicate without saying a word? How do we want University constituents to feel when entering our space? Visitors should feel welcome, comfortable, and inspired. Leadership comes in many forms and every team member is a leader. Our theme/vision is "Embrace the Evolution". Evolution is defined as: the development of something, especially from a simple to a more complex form. Synonyms include: advancement, growth, rise, progress, and expansion. Our values include: relationships, trust, growth, and excellence.
Key Actions: Motivate – Move others to action; translate the vision and values into day-to-day activities and behaviors; guide and motivate others to take actions that support the vision and values. Model – Take actions, make decisions, and shape team or group priorities to reflect the organization's vision and values.

Weight

10

Career Development Activities

Career development goals include training programs, committee work, conference presentations or attendance, or related activities that maintain, develop or broaden employee skills relevant to their current position and/or their career path or to their role in service to the work unit or the broader University community.
Development activities are not rated at the end of the review period, but will be reviewed for progress and future planning.

Career Development Activity

Attend two conferences and assume additional duties in our department

Career Development Activity Description

1. Attend Regional Conference in Summer 2017
2. Attend Conference (or other advising professional development opportunity)
3. Assume additional duties as assigned by Director

Target Completion Date