Meaningful Performance Evaluation Recommendations

Workplace Survey
2020 ITS Action Team
Today’s Speakers

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CATBERT: EVIL DIRECTOR OF HUMAN RESOURCES

I LOVE MY JOB.

HELLO, HAPLESS EMPLOYEE.

I'VE RENAMED THE FOUR LEVELS OF EMPLOYEE PERFORMANCE...

... TO ACCURATELY REFLECT THE VIEWS OF MANAGEMENT.

THE CATEGORY OF "EXCEEDS EXPECTATIONS" IS RENAMED TO...

... "AT LEAST HE OR SHE DOESN'T DROOL ON HIMSELF OR HERSELF."

"MEETS EXPECTATIONS" WILL BE CALLED "LOSER". "DOES NOT MEET EXPECTATIONS" WILL NOW BE CALLED "DIE! DIE! DIE!"

I COULD SEND IT OUT BY E-MAIL BUT I ENJOY SEEING THE LOOKS ON THEIR FACES.
I got a text message from our boss.

"Keep up wrk."

What does that mean?

You just got your annual performance review.
Employees want to know.....

What am I supposed to be doing?
How well am I required to do it?
What do you think of my performance?
How will I be rewarded?
How can I improve my performance?
Meaningful Performance Evaluation Recommendations

Workplace Survey
2020 ITS Action Team
2019 Workplace Survey Background

- Offered every 2 years at Yale
- Conducted November 4 - December 6, 2019
- Yale’s overall 80% participation goal was achieved
- IT results overview presented September, 2020
- One of 9 ITS follow-up initiatives was to improve feedback consistency across C&T and M&P staff
2019 Workplace Survey Results

- Assure 1:1 feedback consistency across MP & CT staff

- In past year, my manager provided a thorough performance review.
  - 78% (M&P) vs. 34% (C&T)

- I have clear performance goals and I know what my manager expects of me.
  - 73% (M&P) vs. 67% (C&T)

- My manager provides sufficient informal feedback on how I am doing my job.
  - 81% (M&P) vs. 60% (C&T)

- My manager recognizes employees for high quality performance.
  - 34% (M&P) vs. 60% (C&T)

Target: 90%
Recommendations

- Socialize and Understand the Timeline
- Confirm Shared Performance Expectations (C&T/M&P)
- Promote Trusting Relationships
- Cultivate Growth
- Self-Assessment Tips
- How to Give and Receive Performance Feedback

- New help guide: ITS performance management resources
ITS Performance Management Cycle

- Spring: Rating & Rewarding
- Summer: Planning
- Fall: Monitoring
- Winter: Developing

Year-Round Communication

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ITS Performance Management Cycle

**Summer - Planning**
- Begin new fiscal year
- Align goals with IT strategic anchors
- Define success metrics
  - C&T/M&P goal setting form

**Fall - Monitoring**
- Assess progress toward goals
- Frequent coaching
- Feedback conversations

**Winter - Developing**
- Progress check-in's
- Improvement/advancement
- Mid-Year Review
  - Individual Development Plan

**Spring - Rating & Rewarding**
- End of fiscal year
- Evaluate overall results
- Self-assessments
- Annual Review
ITS Performance Management Cycle

**Summer**
- Planning
  - Begin new fiscal year
  - Align goals with IT strategic anchors (see below)
  - Define success metrics
  - E&T or FOCUS goal setting form

**Fall**
- Monitoring
  - Progress toward goals
  - Frequent coaching
  - Feedback conversations

**Winter**
- Developing
  - Progress Check-In’s
  - Improvement / Advancement
  - Mid-Year Review
  - Individual Development Plan

**Spring**
- Rating & Rewarding
  - End of fiscal year
  - Evaluate overall results
  - Self-assessments
  - Annual Review

**IT Strategic Anchors**
- One IT@Yale
  - Working Together to Provide Clear and Accessible Services
- Service Quality
  - Consistent and Reliable Delivery of Valued Services
- Workplace of Choice
  - Great People Enthusiastically Working Toward Shared Goals

**New Fiscal Year**
- Spring
  - Coaching & Feedback
  - Rating & Rewarding
- Summer
  - Planning

- Winter
  - Monitoring

- Fall
  - Developing

- Next Year

Year-Round Open & Honest Communication / Timely Feedback
- Give Praise / Promote Trusting Relationships / Listen
- Adjust Goals / Hold consistent 1:1’s & Skip Level Meetings

[https://its.yale.edu/performance](https://its.yale.edu/performance)
ITS Competencies - How We Perform

- C & T Performance Dimensions
  - Customer Service
  - Communication
  - Dependability
  - Initiative
  - Job Knowledge
  - Teamwork
  - Technical Skills
  - Work Quality

- M & P Core Competencies
  - Community
  - Communication
  - Accountability
  - Expertise
  - Diversity
  - Resourcefulness/Results
  - Development
Action Team

- Sandra Germenis, Lead
- Michael Blomberg
- Sarah Hauswirth
- Julie McEvoy
- Andy Newman
- Netal Patel
- Cheri Ross
- Blanche Temple
- Mark Manton
- Maureen Velazquez

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