# Staff Performance Appraisal Project

*To Be Implemented May 1, 2018*

| Org Attributes & Change Characteristics | | Change Management Model | Challenges |
|---|---|---|---|
| **Communication Plan**<br>• Town hall meetings: Introduced project to the campus; Acknowledged IdeaWave responses<br>• Met with HR Council, HR Contacts, Business Officers, AVC's, EVC Divisional Meetings, SPOC<br>• Blink resource created: Town hall slidedecks, new performance standards, rating scales, administrative processes and rules, appraisal tool, associated trainings<br>• Formal campus announcement and rollout (pending finalization of all content and processes)<br>• Town hall meetings to review final project deliverables – demonstrate new appraisal tool (to occur close to time of implementation) | A | **Awareness**<br>Project results: Changes to performance appraisal standards, rating scale, and rules that govern the process. Per policy, all staff MUST have an annual performance evaluation and MUST be advised of performance expectations. | • Project focuses on appraisal process for policy-covered staff only. Critical to make sure all communications clearly state or indicate that project DOES NOT APPLY TO REPRESENTED (UNION) POSITIONS. Requires repetitive messaging.<br>• There are multiple audiences with varying informational needs that must be satisfied: Policy covered staff, supervisors of policy-covered staff, campus department administrators, business officers, HR contacts.<br>• Decouple new standards, ratings, and rules from pay practices. Focus: More meaningful standards and ratings resulting in more accurate appraisals.<br>• Project deliverables and expectations go out to impacted employees through department channels versus directly from project team. |
| **Sponsor Roadmap**<br>• Large multi-tiered project team approach – executive sponsors, campus department sponsors and subject matter experts were invited to participate. | D | **Desire**<br>Project arose from data collected from IdeaWave pertaining to the appraisal process – staff desire for change is high. Project team strategy is designed for optimal management input and campus department buy-in and commitment. | • New process requires all to use the same standards, administrative processes and appraisal tool. Significant shift away from individualized to more standardized approach. Some departments may not prefer new processes, tool, or standards and want to continue with current processes. |
| **Training Plan**<br>• Supervisory Training available immediately before and throughout the appraisal period<br>• HR Contacts<br>• Business Officers | K | **Knowledge**<br>Training will focus on how to: Apply new standards and ratings, conduct the performance conversation using key performance indicators, interpret policy and rules, navigate electronic tool, and how to administer the overall process. | • New rating scale and administrative processes represent significant departure from current processes. Best learning methodologies in such cases is instructor-led training and highly interactive online training. Challenge is supervisor's time away from work and amount of training resources required may not be conducive to instructor-led training or highly-interactive online approach.<br>• Training is not mandatory. Some supervisors or faculty may decide not to attend and therefore may not be fully knowledgeable of new processes. |
| **Coaching Plan** | A | **Ability**<br>• Staff should be able to clearly identify key job functions and how success in performing each of those functions will be measured.<br>• Staff should be knowledgeable of and able to determine how new standards, ratings, and process rules will be applied to their job performance so they can accurately self-evaluate and determine if they are being evaluated accurately and fairly.<br>• Ongoing performance conversations should occur so that staff are able to meet and exceed performance expectations and easily identify and address performance concerns. | • Given changes in definitions and ratings, performance may be assessed differently than in the past, even if in the same job. Coaching challenge is to be proficient in discussing the new standards and ratings and be able to engage in ongoing mutual identification and review of performance progression over the appraisal cycle, using factual performance-based examples in efforts to reach consensus.<br>• Competing priorities and heavy work loads may create barriers to ongoing regular performance discussions; discussions may not get scheduled or may often get cancelled unless there is a need to discuss problematic issues. |
| **Resistance Management Plan** | R | **Reinforcement**<br>• Ongoing performance conversations should occur so that staff are able to meet and exceed performance expectations and clearly identify and address performance concerns.<br>• HR should engage in at least annual communications prior to the beginning of each review cycle.<br>• Supervisors should engage in review of key job functions and responsibilities at the beginning of each review cycle. Staff should be engaged in mutual and clear identification of key job functions and performance standards so they can best determine how standards and ratings are to be applied. | • Pay for performance environment tends to shift employee focus from actual performance feedback and continuous improvement, development, and learning to pay implications. Staff are therefore more likely to resist ratings that do not optimize pay and resist feedback that does not result in a higher-level rating.<br>• Competing priorities and heavy work loads may create barriers to ongoing regular performance discussions; discussions may not get scheduled or may often get cancelled unless there is a need to discuss problematic issues. |
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