Performance Development Rally2Gether

Human Resources – Organizational Development
### November 26th, 2019

Welcome

Agenda

1. What Got You Here?

2. Performance Development Collaborations

3. Performance Development Process

4. Goal Setting Refresher
   - ✓ Goal Setting – Best Practice
   - ✓ SMARTER GOALS
   - ✓ Goals and Objectives

5. Having the Conversations
   - ✓ Development and Career Planning Best Practices
   - ✓ Learning and Growth Opportunities
   - ✓ Ongoing Coaching and Feedback

6. Check-ins and Conversations

7. Next Steps

8. Questions

9. Contact US

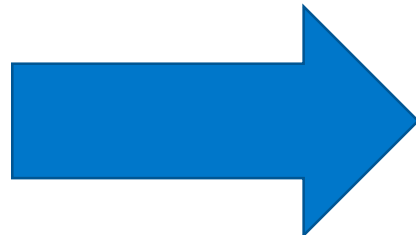10. Thank you!

What Got You Here

Performance Management

- a process of ensuring that a set of activities and outputs meets an organization's goals in an effective and efficient manner.

- can focus on the performance of an organization, a department, an employee, or the processes in place to manage particular tasks

- a process that provides feedback, accountability, and documentation for performance outcomes. It helps employees to channel their talents toward organizational goals

- might involve taking an employee from a less ideal state of performance to a state of optimal performance.
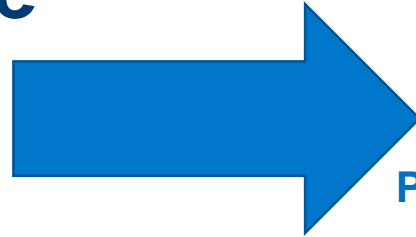
Performance Development

- the ongoing process between supervisor and employee of communicating and clarifying position responsibilities, priorities and performance expectations to guarantee mutual understanding and to enhance effectiveness in achieving the campus and departmental mission and goals.

- an active partnership between the *managers, employees, and the Institution* that enables our diverse staff to be fully engaged and reach their full potential through:
    - **Growth in current role**
    - **Advancement towards future opportunities**
    - **Enhancement of employee engagement**

- has a strengths based focus to assist an employee to move from good to great

Performance Development Collaborations

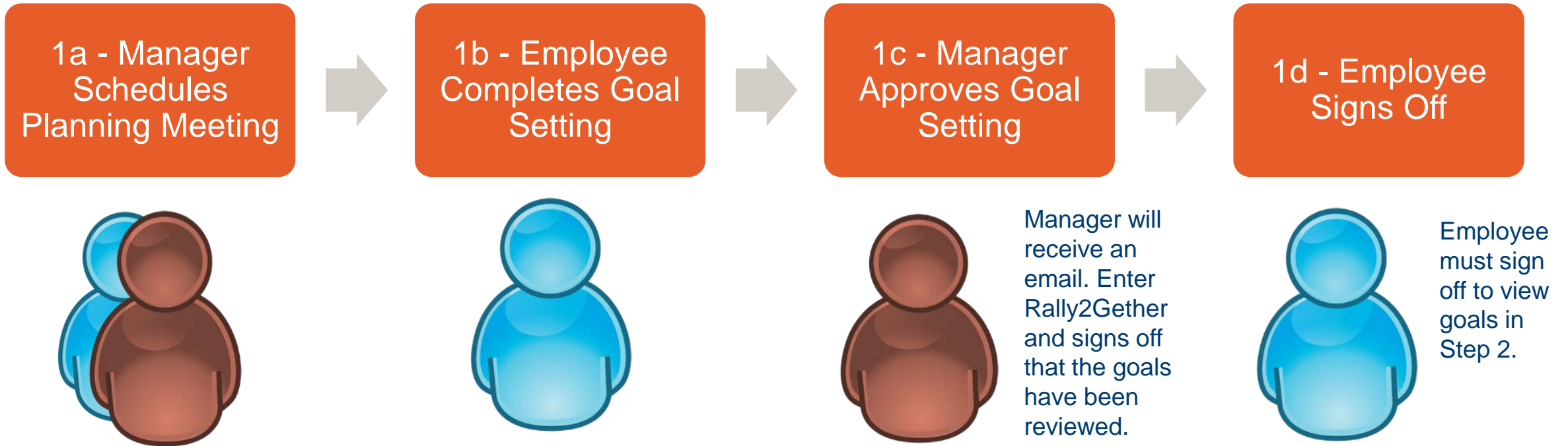|	Benefits	Responsibility
People Leaders	• Establish clear, measurable expectations and create an inclusive climate conducive to success • Guide performance to ensure individual tasks contribute to the attainment of team and department goals • Identify opportunities to enhance performance and build new knowledge and skills	• Provide support, guidance, ongoing coaching and feedback • Note accomplishments and provide feedback for enhancements • Cultivate the development and career potential of each individual • Leverage unique talents and differences • Foster a climate of respect and inclusion
Employees	• Clarify goals and expectations • Receive feedback, resources, and training to meet goals • Identify performance and development goals and understand how they relate to team and department goals • Provide the opportunity to discuss performance and work challenges	• Take the lead role in identifying areas to develop and commit to ongoing development • Be open to receiving feedback • Understand team and department priorities • Track performance and contributions and accomplishments • Contribute to respectful and inclusive climate
University	• Help managers and employees assess how performance development fits in the bigger picture • Support employees and teams to realize goals and objectives • Assist the department to determine whether skills and knowledge of employees can meet future needs of the organization	• Provide the tools and resources that enable learning and growth • Provide guidance and information for managers and employees around best practices

Goal Setting Timeline – April 15 to June 30 2019

Step 1: Goal-setting (April 15 to June 30, 2019)	Time allotted (days)	Start date	End date
Manager schedules planning meeting (should happen before goal-setting begins)	14	Monday, April 15, 2019	Sunday, April 28, 2019
Employee completes goal-setting	35	Monday, April 29, 2019	Sunday, June 2, 2019
Manager approves goal-setting	14	Monday, June 3, 2019	Sunday, June 16, 2019
Employee signs off	14	Monday, June 17, 2019	Sunday, June 30, 2019

STEP 1: Goal Setting Conversation - Workflow

1a - Manager Schedules Planning Meeting	1b - Employee Completes Goal Setting	1c - Manager Approves Goal Setting	1d - Employee Signs Off

Manager will receive an email. Enter Rally2Gether and signs off that the goals have been reviewed.

Employee must sign off to view goals in Step 2.

Goal Setting in Rally2Gether

Check-in No. 1 Timeline – August 2019

Step 2: Check-in No. 1 (August 1 to 30, 2019)	Time allotted (days)	Start date	End date
Employee goal update and check-in questionnaire	15	Thursday, August 1, 2019	Thursday, August 15, 2019
Manager reviews and comments	15	Friday, August 16, 2019	Friday, August 30, 2019

STEP 2: Check-In 1 and 2 - Workflow

Employee Completes Check-In → Manager Completes Check-In → Employee Signs Off

Note – Check-in 1 and 2 are similar in actions.

Goals and Objectives in Rally2Gether

Check-in No. 2 Timeline – November 15 to December 15

Step 2: Check-in No. 2 (November 15 to December 15, 2019)	Time allotted (days)	Start date	End date
Employee goal update and check-in questionnaire	15	Friday, November 15, 2019	Saturday, November 30, 2019
Manager reviews and comments	15	Sunday, December 1, 2019	Sunday, December 15, 2019

Goals and Objectives in Rally2Gether

Performance Development Process

Goal
Setting

Development
Planning

Mid-Cycle
Check In 1

Ongoing
Coaching
and
Feedback

Mid-Cycle
Check In 2

You Are
Here

Ongoing
Coaching
and
Feedback

End-Cycle
Check In

Ongoing
Coaching
and
Feedback

Goal Setting Refresher

Human Resources
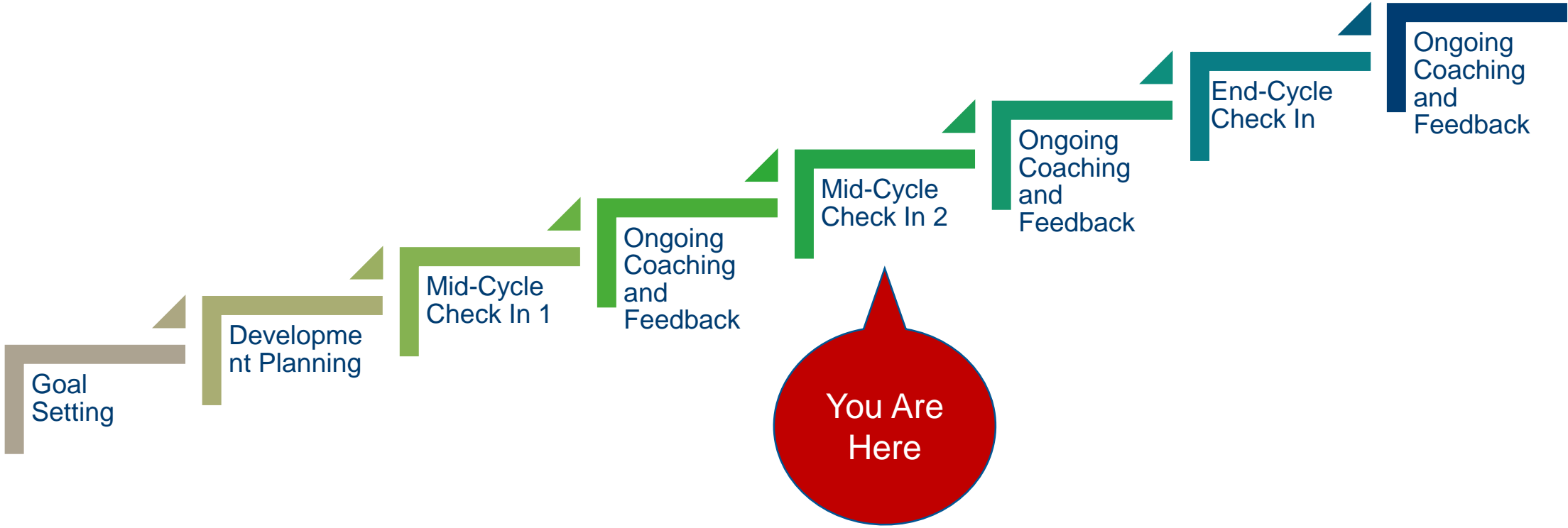
Goal Setting

Setting goals provides long-term vision with short-term motivation by:

- Creating focus and helping us organize time, resources and budget so that people can be the most efficient and effective they can be – *optimizing* performance!

- Allowing us to measure and take pride in achieving and allowing us to see progress visually
  - Reduces the likelihood of 'spinning our wheels'

- Measuring achievement which raises self-confidence and self-efficacy which, in turn, motivates!

- Driving engagement!

Goal Setting – Best Practice

- Created jointly by employee and manager
- Align goals to:
  - ❖ Your role
  - ❖ Goals of the manager
  - ❖ Goals of the faculty/department
  - ❖ Goals of the University
  - ❖ Strategic Priorities
  - ❖ Leader Competencies
- Goals can be performance related, engagement related or development related
- Write goals in the S.M.A.R.T.E.R. format
- Start within the first 6 months of hire
- Employee and manager to revisit frequently and update with coaching/feedback or new direction
- Clear expectations for what success looks like
- Frequently revisited and updated with ongoing coaching and feedback

- **Performance Goals** address what is expected of the employee in their position. Identify clear expectations for success in role.

- **Development Goals** address in what areas or ways should the employee develop for the future. Focus on strengths. Aligned with organizations current and future needs.

- **Engagement Goals** relate to connecting with the organization or broader community including other departments, faculties or engaging with Ontario Tech initiatives.

S.M.A.R.T.E.R. Goals

Specific	Measurable	Attainable	Relevant	Time Based	Evaluate	Reassess
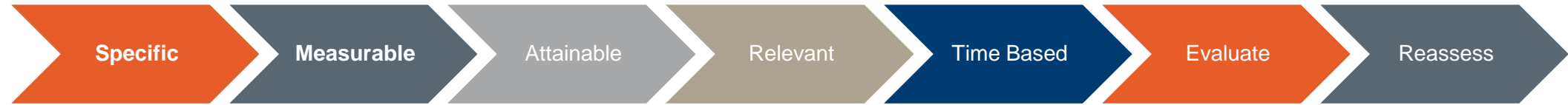
Specific
- What exactly do you want to achieve? The more specific your description, the bigger the chance you'll get exactly that.
- What exactly do I want to achieve? Where? How? When? How? What are the conditions and limitations?
- Why exactly do I want to reach this goal? Is it important enough to me that I feel immediately motivated to achieve it?

Measurable
- Measurable goals mean that you identify exactly what it is you will see, hear, and feel when you reach your goal.
- It means breaking your goal down into measurable elements. You'll need concrete evidence.

Attainable
- Is the goal likely to be accomplished? Do you have the necessary skills, knowledge and resources?
- Is your goal attainable? That means investigating whether the goal really is acceptable to you. You weigh the effort, time and other costs your goal will take against the benefits and the other obligations and priorities you have going on.

Relevant
- The main question is why do you want to reach this goal? What is the objective behind the goal, and will this goal really achieve that?

Time Based
- Make a tentative plan of everything you do. Everybody knows that deadlines are what makes most people switch to action. Create deadlines for yourself and go after them. Keep the timeline realistic and flexible. Set yourself up for success.

Evaluate
- Did you make it all the way to Goal Attainment? Thank goodness you put those measures in place! This is how you'll be able to concretely demonstrate what was achieved.

Reassess
- Having a step at the end where you can look at your goal journey holistically and determine what you would do again, what you would leave out, and what you could try additionally will help with all of your future goal setting cycles. Live and Learn.

SHOOT FOR THE *Moon* EVEN IF YOU MISS YOU'LL LAND AMONG THE *Stars.*

S.M.A.R.T.E.R. Goal - Example

Here is a sample goal:

Keep our department's web page up-to-date.

Does this meet the SMARTER criteria?

What does "up-to-date" mean?

How can the employee and manager be sure that they are working to the same standard?

How can each of them know that the employee has met this goal?

S.M.A.R.T.E.R. Goal - Example

Here is a sample goal:

Keep our department's web page up-to-date.

Here is a revised goal that meets the SMARTER criteria:

On the first Friday of every month, up to and including March 31 2020, solicit updates and new material from our department's managers for the web page; publish this new material no later than the following Friday. Each time new material is published, review our department's web page for material that is out of date, and delete or archive that material.

Specific & simple
Measurable & meaningful
Attainable & achievable
Relevant & results-oriented
Timely & trackable
Evaluate & excitable
Reevaluate & reassess

Goals and Objectives

The words are often used interchangeably but:

- A **goal** is a broad primary outcome.
- An **objective** is a measurable step you take to achieve a goal. It tells you HOW you will accomplish your goal. This may include your tactics. A **tactic** is a tool you use in pursuing an **objective**.

Objectives need to be SMARTER too! For each objective statement include the aspects from SMARTER goal setting. Some will be more complex than others. Some will be very simple and involve only a single task.

Goal		
Objective		Objective
Tactic	Tactic	Tactic
Tactic		Tactic

S.M.A.R.T.E.R. Objective - Example

Here is a sample goal:

On the first Friday of every month, up to and including March 31 2020, solicit updates and new material from our department's managers for the web page; publish this new material no later than the following Friday. Each time new material is published, review our department's web page for material that is out of date, and delete or archive that material.

Here are objectives toward that goal that meet the SMARTER criteria:

Objective 1: Time Management (prioritizing, organizing, delegating, strategic planning, and problem solving)

By September 30 2019, create blocks of time in calendar to:

a) solicit updates from mangers by 21st of each month

b) review for obsolete and redundant content by 22th of each month

c) format and publish new material received by end of each month

d) obtain any approvals required by 29th of each month

Objective 2: Communication (Emotional intelligence, cohesion, clarity, empathy, respect, listening, open mindedness, confidence, collegiality, tone, asking questions)

By October 31, 2019, create standard communications products to:

a) solicit updates from managers (create email content) by Oct 31st

b) book time to consult regarding the removal of potentially obsolete/redundant

content (write the content for the meeting invite) by Oct 31st

Objective 3: Administration …

S.M.A.R.T.E.R. Objective - Example

Objective 1: Time Management

Objective 2: Communication

Objective 3: Administration

You begin to see the competencies that you're building…

Conversely.. You can figure out what competencies you'd like to focus on and create goals to align to them.

Using the Rally2Gether Software

Having The Conversations

Development and Career Planning – Best Practices

This is an ongoing opportunity for managers and employees to take time and have conversations that support an individuals growth and development with the lens of ensuring the organizations current and future needs.

Use these times to:

- Identify opportunities to contribute to the university's priorities

- Identify skills, knowledge, and experiences that can expand an employees contributions and career

- Focus on strengths, preferences, and interests

- Incorporate a personalized development plan to track wide ranges of development activities

- Make use of the professional development opportunities available from Learning and Development - HR

Conversations for Learning and Growth Opportunities

1. Action Oriented

2. People Oriented

3. Knowledge Oriented

Conversations for Learning and Growth Opportunities

Action Oriented Activities

- Work on a project, team or committee

- Job shadow, cross-train

- Lead discussions

- Give presentations to others

ACTION CHANGES THINGS
- Ivelin Radkov

Conversations for Learning and Growth Opportunities

People Oriented Activities

- Attend or facilitate a professional development session, workshop, and/or skill 'n tell session

- Partner with someone to build skills

- Interview a subject matter expert

- Observe others

- Network for skills development

- Volunteer

Conversations for Learning and Growth Opportunities

Knowledge Oriented Activities

- Explore online learning at LinkedIn Learning

- Attend a professional development session, workshop, and/or skill 'n tell session

- Take advantage of Ontario Tech University's Tuition Assistance Plan for courses related to career
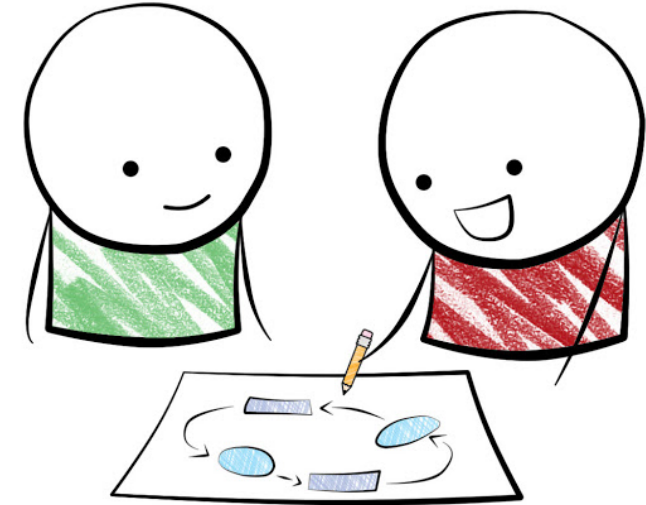
Ongoing Coaching and Feedback

Includes regular, two-way conversation!

This should be as frequent as possible.

The performance development cycle has 3 formal check ins but

don't let those formal cycle points stop you from

having as many conversations as you'd like.

Ongoing Coaching and Feedback – Best Practices

Includes regular, two-way conversation recognizing the successes of the performance toward goal achievement and exploring how to improve as well as discussing continued growth and development

- Recognize goal achievement and milestones toward goal achievement

- Recognize demonstrated valued behaviours

- Recognize individual and team efforts

Ongoing Coaching and Feedback – Giving Feedback

Feedback Loop

Manager → Employee → Feedback Loop
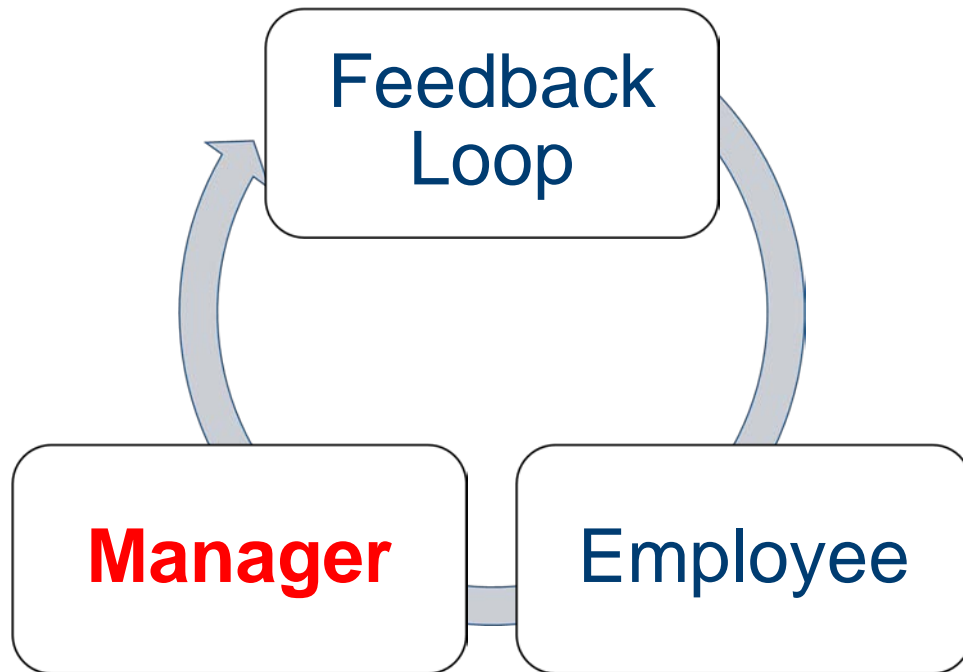
Feedback is most useful when the receiver expresses an interest in having feedback

Describe observations of a situation; be descriptive as opposed to evaluative; describe your observations

Discuss changeable behaviours and actions as opposed to attitudes or personality

Validate with others; understand if this is one person's impression or a shared impression

Give feedback at the earliest opportunity

Check that the employee is ready to hear feedback; understand their needs by asking open ended questions

Keep in mind the valid points of others

Focus on goal attainment and identifying next steps

Ongoing Coaching and Feedback – Requesting Feedback

Feedback Loop

Manager

Employee
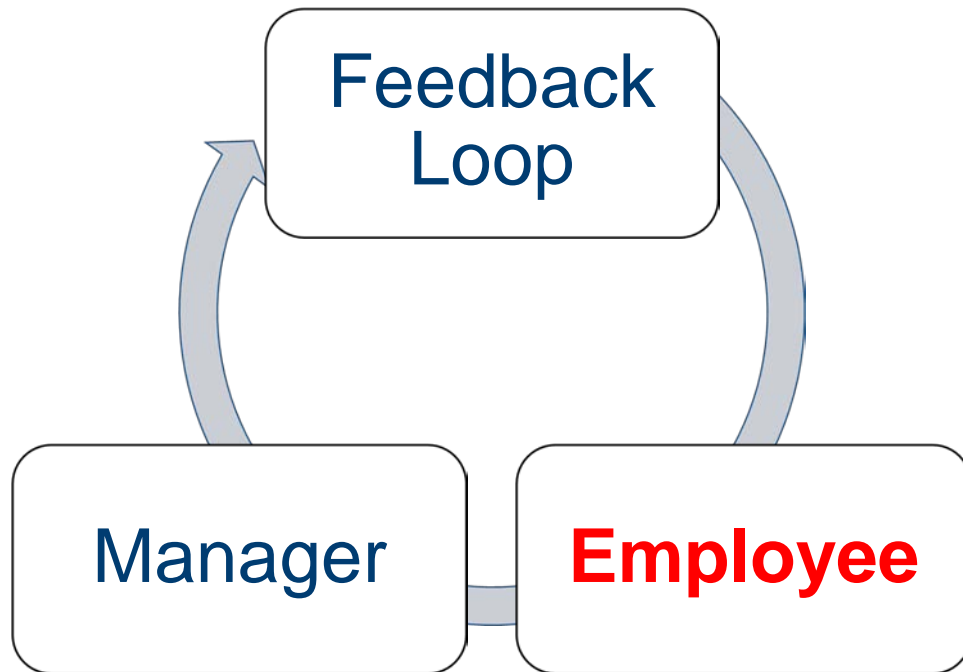
Assume good intentions and listen actively

Identify key messages

Clarity your understanding and ask for specific examples/behaviours; rephrase

Examine different approaches that could be taken

Consider what can or has been learned

Give yourself time to process and respond to feedback

Thank the other person for giving you things to consider even if you don't agree or plan to follow their feedback

Ask for specific examples:

- What's the one thing I can do that will make a difference?
- Who should I be working with more closely?
- What do I need to work on to be ready for … (assignment/project)

Ongoing Coaching and Feedback – Receiving Feedback

Feedback Loop

Manager

Employee
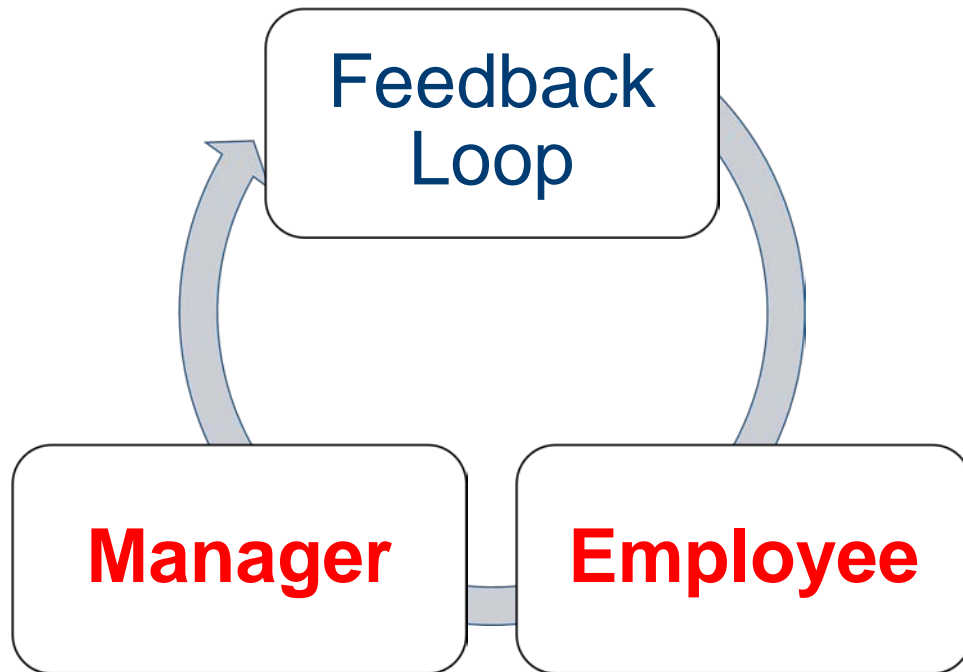
Listen actively and assume good intentions

Listen for key messages

Clarify what you are hearing

Ask for ideas about different approaches you could take

Consider what you can learn and avoid being defensive

Give yourself time to process and respond to feedback

Ask for ongoing feedback or coaching on next steps/actions

Ongoing Coaching and Feedback Conversations

There are many opportunities to have coaching or feedback conversations about performance, development, and matters related to employee engagement and working in a supportive and inclusive environment. Holding these conversations regularly drives organizational and employee success.

- Informal conversations
    - Weekly or bi-weekly one on ones
    - After observing performance in a team meeting
    - After accomplishing results
    - As part of problem solving discussion
    - During new assignments
- Formal conversations
    - Upon project completion
    - During development / career planning conversations
    - Follow up conversations on development plans
    - Mid-Year check-in conversations
    - Annual performance discussions

Ongoing Coaching and Feedback – Growth in Current Role Questions

What's working well?

What's been challenging?

What are you most proud of?

What would you like more of?

What do you wish you had more time for?

What do you want to learn more about?

How can Ontario Tech University best leverage your knowledge, skills, and strengths?

What skills do you want to develop to be exceptional in your current role?

What's one thing you could do to play to your strengths even more?

What should you stop/start/continue doing?

What changes are needed and how can we make them happen?

What else do you need to help you get there?

What feedback do you get that is most helpful to you?

Ongoing Coaching and Feedback – Career Progression Questions

What are our top 3 to 5 priorities and what do we need in order to achieve them?

What would you like to get further experience doing?

What areas of expertise would you like to develop even more?

What behaviors could you exhibit to help you grow in your career?

What other teams, functions, or areas of expertise are you interested in?

What work do you see yourself doing in the near term? Long term?

Where do you want your career to go from here?

What extra skills, knowledge or experience do you need to get there?

How do you propose getting there, and what's the timeline?

How can I best support you in achieving your goals?

Ongoing Coaching and Feedback – Employee Engagement Questions

What keeps you here?

What do you most like doing?

What do you least like doing?

What contributes the most to your job satisfaction?

How do you like to be recognized?

How might I contribute to an environment where you love coming to work everyday?

What's one thing I could do to help you feel more connected to the team?

What's one thing I can do to help you feel heard/welcome/valued/included?

What's one thing I'm doing well that I should continue?

What's one thing I could do to support you in doing your best work?

Check-ins and Conversations

Check-ins and Conversation

- Employee submits goals/objectives/status comments using Rally2Gether

- Manager and Employee meet regularly to discuss goals/objectives/status/assistance. This may be more than twice annually. Check ins (August & November) and Final Check-in (Feb-March) are the formal check in points where progress needs to be documented in Rally2Gether
  - Use clear language to describe:
    - Performance compared to expectations that were agreed upon
    - Accomplishments and contributions
    - Strengths and development opportunities
    - Key expectations moving forward
  - Focus on observable and measurable performance
  - Stay away from vague statements
  - Position shortfalls as an opportunity for learning and adjustment
  - Agree upon next steps or commitments
  - Discuss successes and identify specific results achieved
  - Discuss obstacles encountered. Why did they arise? What ways could they be dealt with?
  - Document the notes from the meeting in Rally2Gether against goals/objectives
  - Plan for follow up discuss on any open items

Next Steps

- Request us at your Team Meeting

- Review all of the job aids on the Learning and Development Webpage

- Complete the Check-In Process in Rally2Gether

Questions

Contact Us

Jennifer Topping
OD Consultant
Ontario Tech University
905.721.8668 ext. 2347
jennifer.topping@ontariotechu.ca
ontariotechu.ca

Heather Cooke
HR Co-ordinator - Human Resources
Ontario Tech University
905.721.8668 ext. 6168
heather.cooke@uoit.ca
ontariotechu.ca

Human Resources

HEALTHY WORKPLACE   LEADER SUPPORT   LEARNING AND DEVELOPMENT

HOME / LEARNING AND DEVELOPMENT / PERFORMANCE DEVELOPMENT CYCLE

Thank You