

PERFORMANCE MANAGEMENT

Qualified Evaluator Training

Ground Rules



Silence your phone!!

Remain present and actively participate.

Keep an open mind.

Ask questions when you don't understand.

Have fun!

Training Objectives

By the end of this training session, you will be able to:

Describe

- Describe the performance management process.

Prepare

- Effectively prepare for your performance review.

Deliver

- Deliver effective performance reviews to your direct reports.

Complete

- Complete the online performance review process within UKG.

Welcome and Introductions!


- Interview one person you don't know OR don't know well and write down the following information about your partner on the **Partner Introduction** sheet:
 - First and Last Name
 - Location
 - Job Title
 - Connection Question (and answer)
- Switch roles, so both of you are interviewed.
- Each person introduces their partner.

What is Performance Management?

- Performance management is the process of creating and maintaining a productive and efficient work environment where team members can fulfill their full potential.
- Performance management begins when a team member is hired and does not end until they leave the company or organization.

Effective Performance Reviews and Feedback Help!


Is your performance measured based on what you do on a daily basis?




Do you feel appreciated for the job you do?



What is the frequency of feedback from your supervisor?



Does your supervisor seem to care about you as a person?



Would you recommend us as a place of employment to family and friends?

Performance Review Overview

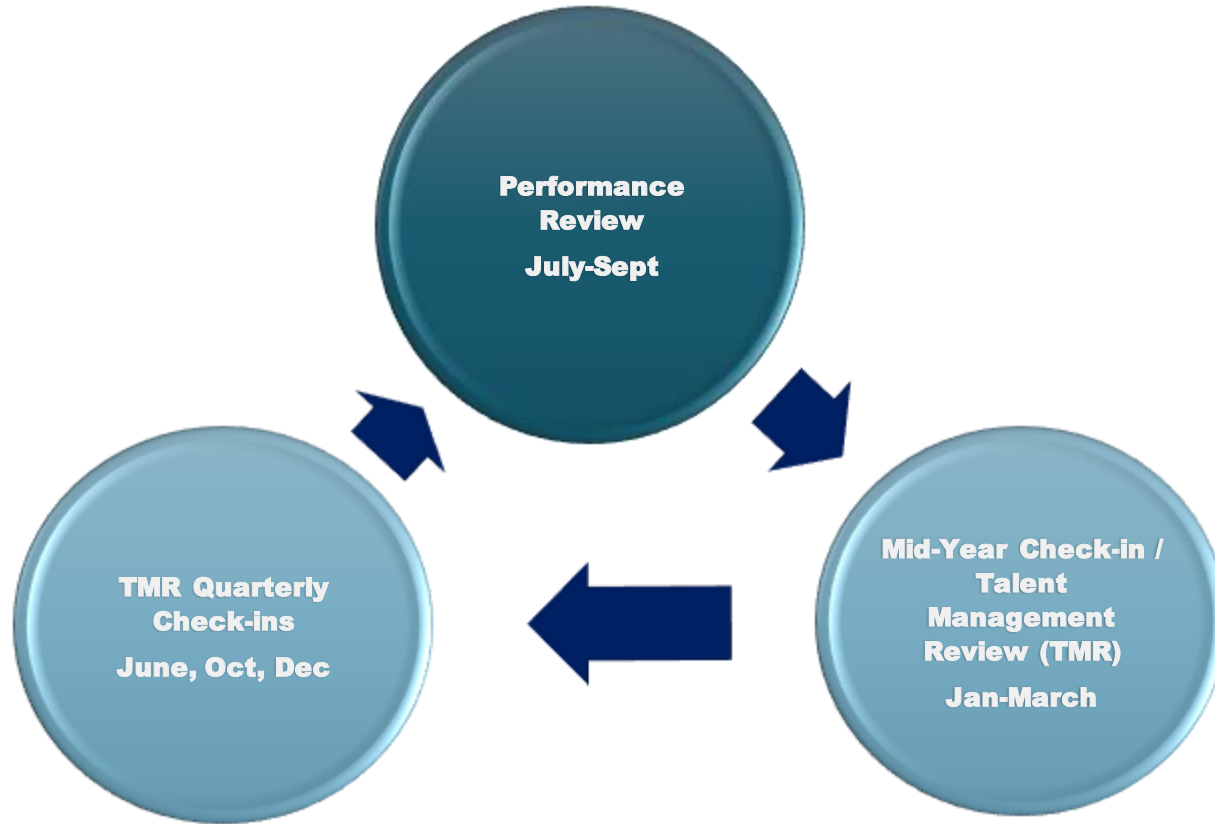
Performance Review Process

A fully standardized, automated, online process, using UKG (Kronos)

We provide feedback to our team about performance against behavioral standards (The 6Cs)

A common review date for all team members

What Does the Process Look Like?



Sun Health Behaviors (The 6Cs)

Sun Health Behaviors (The 6Cs)

Customer Focus (Internal & External)

Communication

Collaboration & Teamwork

Creativity & Innovation

Credibility

Commitment to Compliance

Customer Focus (Internal & External)

Quickly and effectively responds to customer needs.

Presents a cheerful, positive manner with customers.

Assumes shared accountability for improving service delivery.

A Special Customer Service Contribution

Johnny the Bagger



- What was Johnny's special gift he shared with customers?
- How did the customers react to what Johnny did?
- How did Johnny make a difference for the customers? For the grocery store and the other employees?

Communication

Conveys information clearly, concisely and professionally.

Provides and receives feedback in a positive manner.

Listens well and asks good questions.

Effectively adjusts communication style for the situation/audience.

Communication Practice!

Role Play: Pick any customer service situation where a team member interacts with a customer.

- Role Play 1 – The team member demonstrates all parts of communication *well*
- Role Play 2 – The team member demonstrates all parts of communication *poorly*

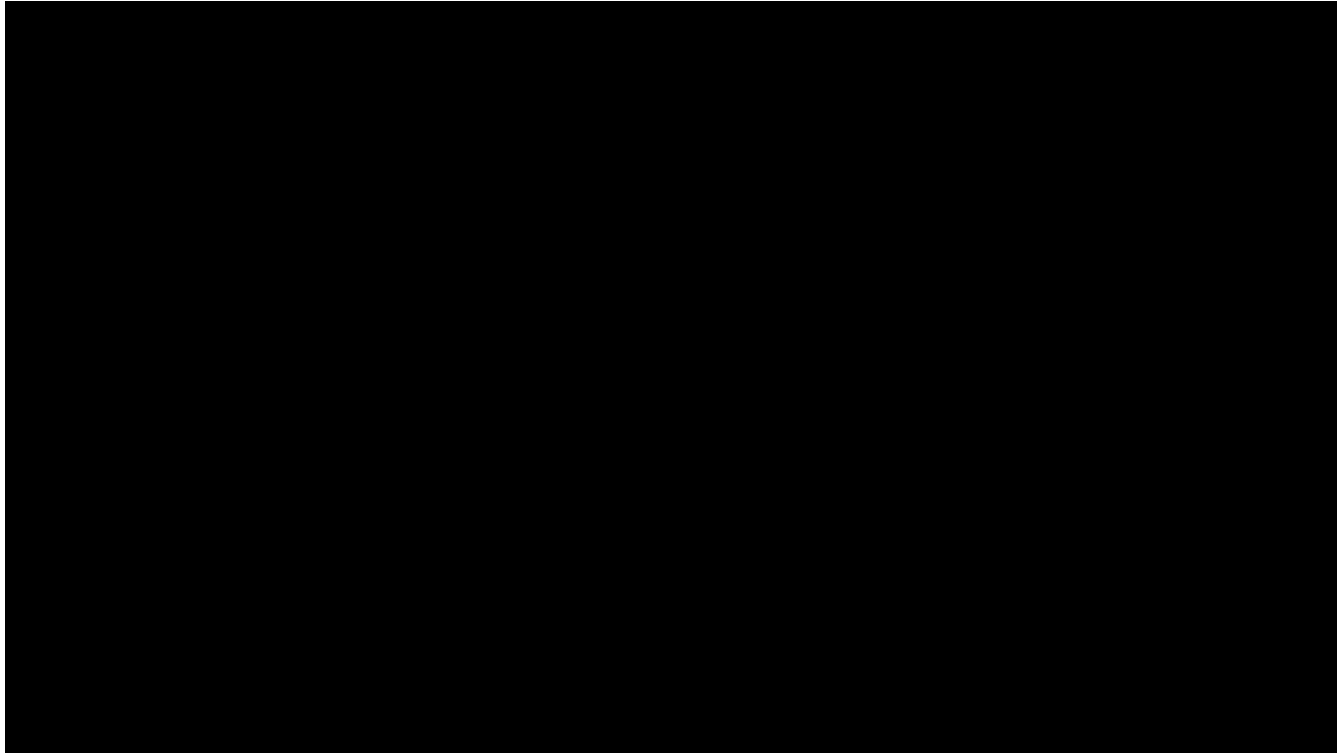
Collaboration and Teamwork

Has a responsive, positive attitude toward work and co-workers.

Carries his/her fair share of the workload.

Avoids creating conflict and unnecessary confrontation.

Collaboration and Teamwork (at its best)



Creativity and Innovation

Looks for and suggests ways to make on-the-job improvements.

Takes smart risks including trying new and different ways to get the job done better.

Is willing to listen to suggestions from others and try new ideas.

Credibility

Consistently tells
the truth.

Follows through on
commitments and
agreements.

Takes responsibility
for own mistakes
and does not
blame others.

Commitment to Compliance

Keeps licensures, certifications and/or compliance training up-to-date and on time.

Consistently adheres to company policies, procedures and employee handbook.

Neither participates in nor condones offensive or discriminatory behavior, and reports concerns in a timely manner.

Sun Health Behaviors (The 6Cs) *Activity*

Using the **Sun Health Behaviors (The 6Cs)** Self-Evaluation, rate yourself on each of them as *All of the Time, Most of the Time, Some of the Time* or *None of the Time*.

Jot down one strength and one opportunity for each.

Leader Job Skills and Abilities (JSAs)

Leader Job Skills & Abilities

- Ensuring Employee Accountability
- Fostering Connection and Belonging
- Influencing and Leading Change
- Making Effective Decisions
- Managing Employee Performance and Development
- Demonstrating Emotional Skills/Intelligence (EI)

Ensuring Employee Accountability

- Communicates clear goals and responsibilities to employees.
- Monitors employee performance and holds them and oneself accountable for completing tasks/responsibilities in a quality and timely manner.
- Firmly, promptly and equitably addresses compliance and performance issues.

Fostering Connection and Belonging

- Recognizes and appreciates others for their contributions and achievements.
- Enlists the active participation of everyone on the team.
- Consistently connects employee and department work to the organization's mission and vision.
- Promotes cooperation across departments.

Influencing and Leading Change

- Seizes opportunities to influence the future direction of his/her department, campus or organization.
- Helps employees develop a clear understanding of what they will need to do differently during change.
- Helps individuals and groups manage the anxiety associated with change.
- Celebrates successful changes with teams.

Making Effective Decisions

- Demonstrates sound judgment and problem-solving techniques that support the department, campus and organization.
- Solicits input from employees and other stakeholders and incorporates feedback into decision making.
- Is willing to make decisions in difficult or ambiguous situations, when time is critical.

Managing Employee Performance and Development

- Supports employees in their efforts to achieve job goals by providing resources, removing obstacles, acting as a buffer, etc.
- Stays informed about employee progress and performance through both formal methods (such as status reports) and informal methods (such as management by walking around).
- Provides both positive and corrective performance feedback in a timely manner, and coaches for improved performance.

Demonstrating Emotional Skills/Intelligence (EI)

- Understands own strengths and weaknesses and how their actions affect others.
- Is able to stay flexible and positive around others by thinking before acting.
- Is able to pick up on emotions in other people and understand what is really going on.
- Manages interactions with others effectively, demonstrating an ability to find common ground and build rapport.

Let's Test Your Knowledge!

Go to www.menti.com

Enter code 1792 6909

Leader Job Skills & Abilities (JSAs) Self-Evaluation

Only leaders are required to complete the **Leader Job Skills & Abilities (JSAs) Self-Evaluation** form each year

You will provide this form to your supervisor prior to your annual evaluation.

Performance Review Preparation and Tools for Success

Performance Review Preparation



What “Not to Do”



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Performance Review

Before the Meeting

- Schedule meeting in advance in a private place (45 minutes to an hour)
- Gather documentation for a robust review
- Have employee complete self-evaluation early (July) so you can finish your review (July-September)

Avoid Rater Errors



Performance Review

Before the Meeting

- Remember to avoid rater errors:
 - Halo Effect
 - Leniency
 - Central Tendency
 - Recency
 - First Impression
 - Similar-to-Me

Performance Review

During the Meeting

- Have questions prepared for a two-way conversation
- Focus on strengths more than opportunities
- Develop a plan for a broader career discussion
- Celebrate successes and be inspirational about the next year

Performance Review - WRONG WAY



Discussion Questions

- What did the leader do well in the scenario, and why?
- What could the leader have done better in the scenario, and why?

Performance Review - A BETTER WAY



Discussion Questions

- What did the leader do well in the scenario, and why?
- What could the leader have done better in the scenario, and why?

Employee Calibration Sessions

- Leaders within a department get together to review employee ratings
- Leaders discuss and make changes to ratings and/or feedback before employee review meetings begin
- Helps ensure more fair and accurate ratings & feedback for employees

Additional Performance Review Tools



- Performance Review DOs and DON'Ts
- Performance Review Coaching Questions

Merit Increase and VPP Payout

- **VPP Payout for FY2022**
 - Managers and above will be expected to report results on their VPP goals.
 - **Next steps will be communicated in the coming weeks.**
- **Merit Increases**
 - Managers and above will be eligible for merit, payable in October 2022.
 - Any team member who isn't eligible for VPP or another bonus program is eligible for merit, paid out in January 2023.

FY2022 Performance Review Process Steps

Review Performance Review
TEST Big Kahuna (Sun Health Employee Ser...
TEST Big Kahuna: FY2022 SH LEADER Perfor...
Created 07/04/2022 03:19 pm

Review Performance Review
TK TEST Big Kahuna (Sun Health Employee Services LLC) (111111)

[View Performance Review](#) [View Workflow](#)

Direct Manager	WENDY M. PARDONCHE	Secondary Manager	WENDY M. PARDONCHE
Executive Director	WENDY M. PARDONCHE	Campus HR	MELISSA CUARON
Approver	TEST-BIG KAHUNA	Jobs (HR)	DIRECTOR OF LIFE ENRICHMENT

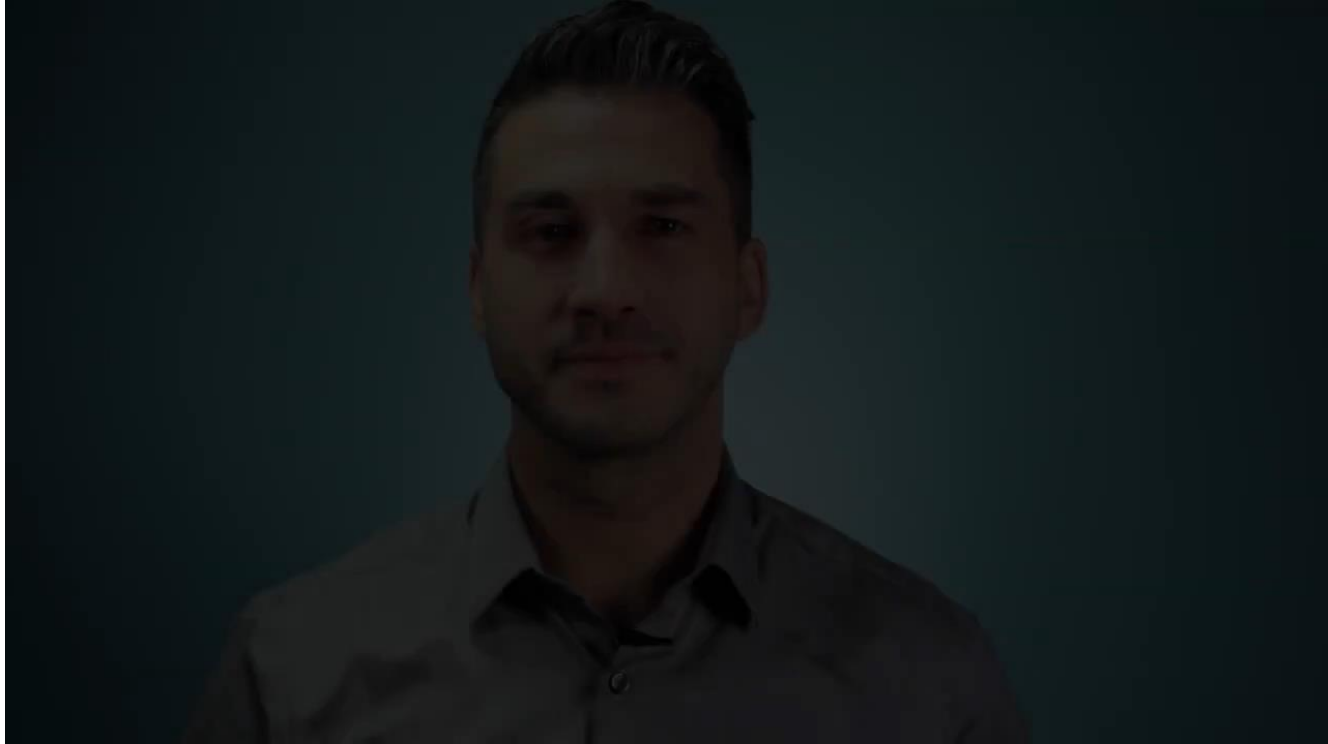
CLICK HERE TO COMPLETE THE REVIEW!

Review

Overall Performance Ratings & Definitions

Final Performance Rating	Definition
Exceeds Expectations	Consistently demonstrates high level of performance. Consistently works toward overall objectives of the department and or organization. Viewed as a role model in position. Demonstrates high levels of effort, effectiveness, and judgment with limited or no supervision.
Meets Expectations	Consistently demonstrates effective performance, <u>meeting</u> and sometimes exceeding expectations. Performance is reflective of a fully qualified and experienced individual in this position. Viewed as someone who gets the job done and effectively prioritizes work. Contributes to the overall objectives of the department and or the organization. Achieves valuable accomplishments in several critical areas of the job.
Improvement Needed	Working toward gaining proficiency. Demonstrates satisfactory performance inconsistently. Achieves some but not all goals and is acquiring necessary knowledge and skills. Performance Improvement Plan (PIP) required. For newer employees: This rating can be used when an employee is still coming up to speed with their job duties as appropriate, based on their tenure in the position.

7 Tips for Conducting a Better Performance Review



GREAT PLACE TO WORK SURVEY

Great Place to Work (GPTW) Survey

Survey Design

Overall Design	Distributions	Benchmarks	Definitions	Scale
<p>60 Trust Index® statements</p> <p>13 demographics</p> <p>2 open-ended questions</p>	<p>452 responses</p> <p>602 invited</p> <p>75% response rate</p> <p>Margin of Error: +/- 4%</p>	<p>Compare your results to the Sun Health GPTW Certification 2021</p>	<p>Organization: <i>Refers to your company overall.</i></p> <p>Management: <i>Refers to the senior leaders at your company. Location by location, it often means the managers that frontline staff interact with.</i></p>	<p>Survey measures consistency of employee experience: "Almost always untrue" to "Almost always true."</p>

Great Place to Work (GPTW) Survey

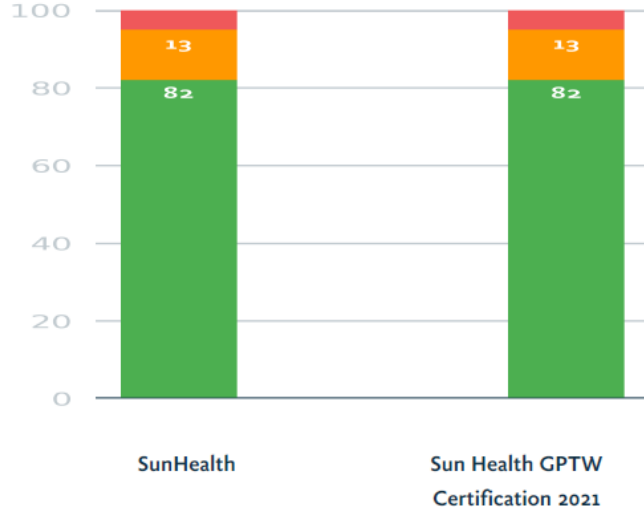
3. HIGH-LEVEL RESULTS

Comparison to Best Companies

Scores presented as Positive are the % who respond 'Almost Always True' or 'Often True'

Survey participants responded to each statement using a 1-5 scale. The overall score reflects responses to all statements.

SunHealth scored a 82 compared to the Sun Health GPTW Certification 2021 of 82



Great Place to Work (GPTW) Survey

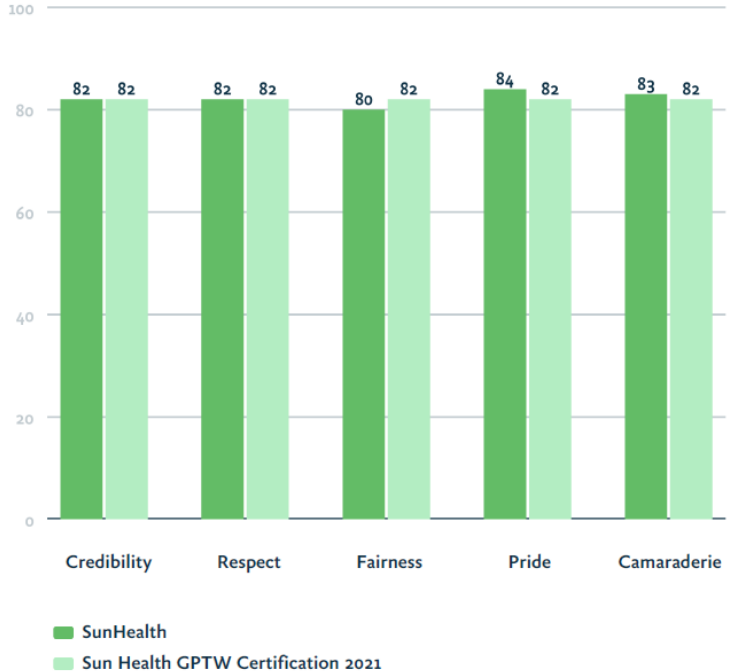
3. HIGH-LEVEL RESULTS

Comparison by Dimensions

Scores presented are % Positive.

Survey participants responded to the statements that correlate to each dimension using a 1-5 scale. Dimension scores reflect the average % positive responses of all statements in each dimension.

Comparison by the 5 Core Dimensions of Trust



Great Place to Work (GPTW) Survey

3. HIGH-LEVEL RESULTS

Strengths

The following statements represent your most positive scores, compare to the Best Companies benchmark.

These are potential areas to celebrate and further leverage.

This is a physically safe place to work.
Respect

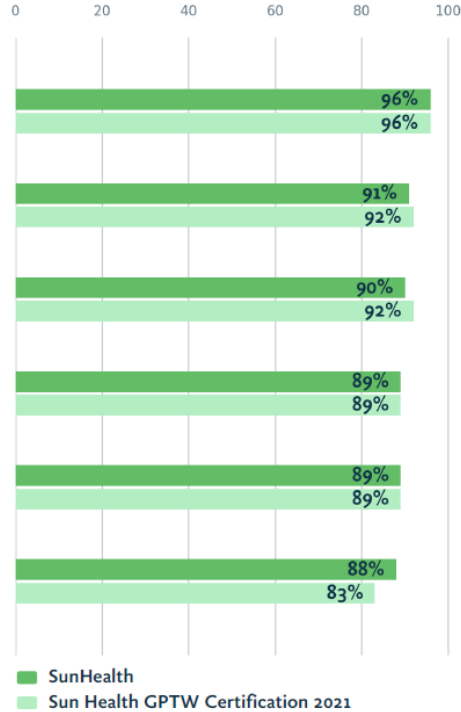
I feel good about the ways we contribute to the community.
Pride

When you join the company, you are made to feel welcome.
Camaraderie

I'm proud to tell others I work here.
Pride

When I look at what we accomplish, I feel a sense of pride.
Pride

I am able to take time off from work when I think it's necessary.
Respect



Great Place to Work (GPTW) Survey

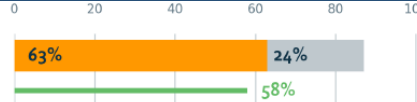
3. HIGH-LEVEL RESULTS

Opportunities

The following statements represent your least favorable scores compared to the Best Companies benchmark. They indicate potential opportunities for improvement.

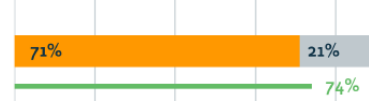
People here are paid fairly for the work they do.

Fairness



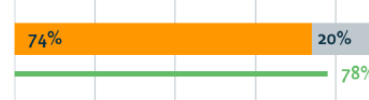
Promotions go to those who best deserve them.

Fairness



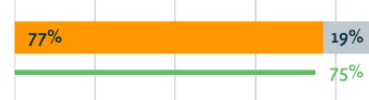
This is a psychologically and emotionally healthy place to work.

Respect



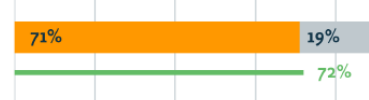
You can count on people to cooperate.

Camaraderie



Management involves people in decisions that affect their jobs or work environment.

Respect



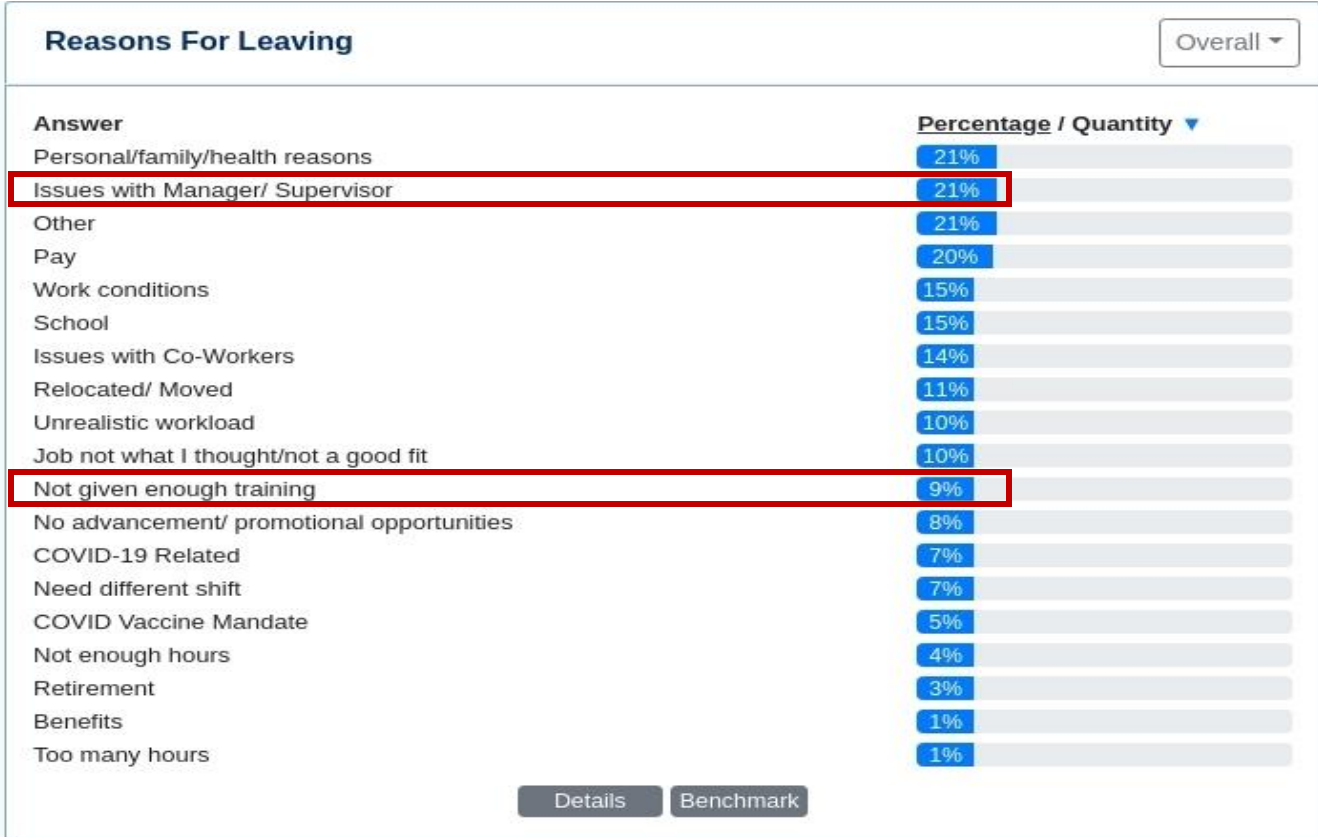
People look forward to coming to work here.

Pride



Positive Responses Inconsistent Responses
Sun Health GPTW Certification 2021

WeCare Connect Feedback



WeCare Connect Feedback



WeCare Connect Feedback



Workforce: Attract, Train, Retain

Initiatives/Objectives/Tactics
<i>Develop and execute strategy to attract, train and retain a changing <u>workforce</u>.**</i>
B. Improve overall effectiveness of leaders.
1. Implement high impact training for leaders to include LEAD, Toolbox and New Leader Boot Camp
2. Tap into LeadingAge forums to learn from peers in other aging services organizations and identify/implement additional best practices through non-profit networking - connect with LeadingAge members within our area to network. Drive the learning to front-line team members.
3. Design, launch and foster a formal mentoring program for top leaders (internal or external).
4. No meetings scheduled at least one day a week (i.e., no meetings on Fridays).
5. Create accountability for effectively completing performance reviews and providing ongoing team member feedback around a less complex Performance Management Review process.
6. Identify and develop informal/formal leaders and emerging leaders.
7. Provide tools and training for leaders to improve mental and emotional wellbeing.
8. Develop a formal approach to appreciating and recognizing team members on a consistent basis to create a culture of appreciation.

QUESTIONS?

Please provide your feedback!

