



MANAGING EMPLOYEE PERFORMANCE

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Guest Presenters:

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Objectives

In this workshop, you will learn about:

- Employee performance management
- Attributes of high-performing organizations
- A five-step performance management model
- Resources available to help you implement this model
- The CalSTRS story – putting it into action

Additionally, we will gather your input and ideas on how CalHR can support your organizational performance engagement efforts.

What is Employee Performance Management?

“...the systematic process by which an agency involves its employees, as individuals and members of a group, in improving [individual and] organizational effectiveness in the accomplishment of agency mission and goals.” - U.S. Office of Personnel Management

Back to Basics

How would you score your organization when it comes to actually implementing these performance management basics?

Performance Planning: Do employees have written goals that clearly identify their key responsibilities, objectives and tasks, and an IDP?

Performance Coaching: Do managers meet with employees at least twice per month to discuss progress, identify roadblocks, and get the direction and support they need to succeed?

Performance Evaluation: Are there are no surprises when it comes to annual reviews? Are managers and direct reports "in-synch" because performance goals are measured on a regular basis instead of once a year?

Attributes of High-performing Organizations

- Top leaders support and model performance-based behavior
- Organizational mission, vision, goals and objectives are defined and communicated consistently and continuously
- Job duties and responsibilities are aligned with the organization's mission and goals

Attributes of High-performing Organizations Continued

- Competencies needed to accomplish the mission and to achieve organizational goals are identified and defined
- Employees know how they contribute to organizational success
- Organizational performance measures are developed and information systems capture performance data





It's a good thing...

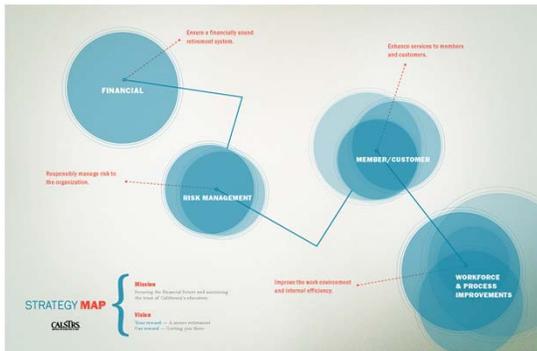
When employees have clear goals and performance expectations, they understand how they add value to their organization and are more...

- Productive
- Energized
- Engaged

And it's the law

- Government Code Section 19992 (Probationary Employees –Government Code Sections 19172 and 19173)
- If not done right, performance evaluations can go horribly wrong
- That's why planning work, setting expectations, observing individual performance, developing the capacity to perform, evaluating performance, and recognizing successful performance are so very important

The CalSTRS Story



Goals into Objectives and Initiatives



Goal 4. Improve the work environment and internal efficiency.

B. Develop a workforce plan for the organization

Initiatives:

1. Finalize Leadership Development & Succession Plan

Initiatives into Action

2007 – 2008 Strategic Plan

- Supportive Organizational Environment
- Adequate Human Resources
- Become Employer of Choice
- Expand performance expectations and quality measurement in employee evaluations

Start with the Subject Matter Experts

2007 – 2009

- Organization wide effort
- Focus Groups
- Subject Matter Experts (SME) at all levels
- Validated by leadership

The results:

- CalSTRS Competencies Established
- Classification/Job Families Established
- Classification Family Competencies
- CalSTRS Core Competencies

Strengthening the Core

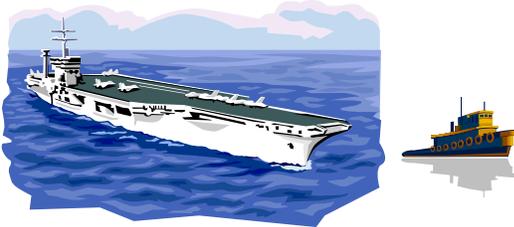
CalSTRS Core Competencies

CalSTRS Core Values

Adaptability/Flexibility	Customer Service
Communication	Accountability
Customer/Client Focus	Leadership
Teamwork	Strength
Work Standards/Quality	Trust
Orientation	Respect
	Stewardship

The Tugboat and the Carrier

- Change takes time
- Training and communication are key
- Get everyone on board



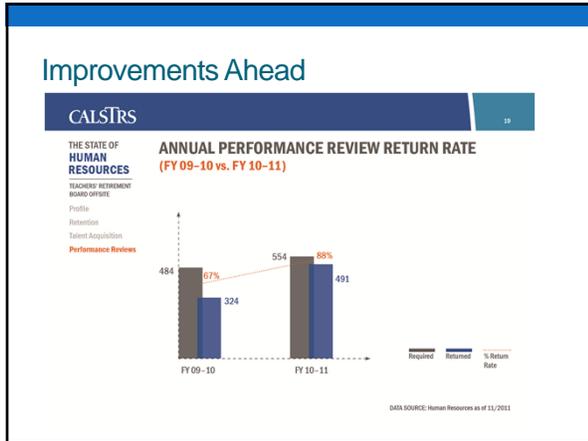
Making Performance a Priority

- Seek out Champions
- Reinforce the message
- Manage performance by targeting development
- Don't forget WIIFM
 - Explain how highly performing employees benefit leaders
 - Explain how highly performing employees and leaders benefit the organization as a whole.

Training, Communication and More

- Annual Performance Review (APR) Tool Kit
- Leader-specific APR Workshops
- IDP/Core Competency Training
 - Leaders
 - Staff
- Set expectations for accountability
- Onboarding and Recognition





- ### Best of Both Worlds
- Incorporated Core Competencies and Core Values into performance documents
 - Started with standard state forms
 - Std. 637
 - AD 1901
 - Merged performance and qualification factors
 - Standardized ratings

- ### What's Happening Now
- Evolving program offerings
 - Identifying additional success factors
 - Refining workforce related data tracking, collecting and analysis
 - Expanding into Classification Families
 - Leader 1
 - Leader 2
 - Investment Director
 - Investment Portfolio Manager
 - Investment Officer III

Discussion Question

In groups of 4-5, will you take 8 minutes to discuss the following question and be ready to report out:

- What barriers exist to implementing the performance management model in your department?
- What solutions do you recommend for your colleagues?
- What can CalHR do on a statewide level to support employee performance management in your organization?

Resources

A few highlights!

- Performance Management Resource Center
- Webinars: Performance Management 101, Developing IDPs
- Leadership Competency Development Guides on Performance Management
- Coming soon! The Supervisor's Guide to Addressing Poor Performance

Quote

“Conversations drive organizational culture. Organizational culture drives performance.”

- David Logan

Action Items

- Start the conversations at all levels about IDPs, annual training plans, and employee and organizational performance.
- Develop your own IDP.
- Develop IDPs with your employees.
- Set up monthly/quarterly discussions with employees.
- Read an article on giving effective feedback.
- Ask employees for their ideas.
- Share organizational metrics with employees.
- Show employees how their performance ties to organizational success.

Thank you for joining us today!

Contact us

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