



Overview of Performance Management

Performance Management at BC

Performance Management is...

- ❖ **Contextual**
- ❖ **Integral** to our daily responsibilities
- ❖ **An investment** in the University and its employees



University Mission, Vision, Goals, and Values

- ❖ Boston College mission and vision:
 - *“To become the world’s leading Catholic university and theological center”*
- ❖ University goals:
 - Strategic Directions: *“Ever to Excel: Advancing Boston College’s Mission”*
- ❖ University values and culture
 - The Ignatian Tradition

The Ignatian Tradition



University Performance Management Competency Model:

- Employee performance must support the unique mission of BC as reflected in our Ignatian Tradition
- Accountability

University Strategic Directions

- Commitment to formation

Four Strategic Directions

Strategic Direction I

- ❖ Re-envision **liberal arts education** at Boston College by sustained attention to the Core Curriculum, enhancing faculty quality and engagement, and **leveraging the strengths of undergraduate programs** in the Morrissey College of Arts and Sciences, Carroll School of Management, Connell School of Nursing, and Lynch School of Education.

Strategic Direction II

- ❖ Enhance the University's commitment to **formation among students, faculty, and staff** to further Boston College's **mission** and strengthen its institutional **culture**.

Four Strategic Directions



Strategic Direction III

- ❖ Expand support for **scholarship and research** in keeping with Boston College's mission to help address complex societal problems and contribute to the common good, with a particular **focus on the sciences**.

Strategic Direction IV

- ❖ Increase the University's **presence and impact** in the City of Boston, the United States, and **around the globe**.

Responding to External Forces

- ❖ *Competitive markets* for attracting and retaining top students, faculty, and staff
- ❖ *Government laws* , regulations, and compliance requirements
 - Title IX
 - Affordable Care Act
 - Minimum Wage
 - FLSA Overtime Rule
 - Massachusetts Equal Pay Act
- ❖ *Information Technology*
 - Cloud
 - SaaS (Software as a Subscription)
 - CRM
 - Security

Optimizing Resources

- ❖ Contain **operating costs** , which directly impact the cost of tuition
 - *Stewardship*
 - *Decision- making*
- ❖ Sustain and further advance the University's mission and goals
 - *Planning*
 - *Assessment*

Mechanisms for Managing Performance in a Dynamic, Competitive, and Aspirational Environment

- ❖ At the **institutional** level - *University, Division, School, and Department:*
 - Strategic Plan
 - Long-Range Financial Plan
 - Campus Master Plan
 - Capital Campaign Plan
 - Organizational restructuring and job redesign
 - Formal assessment of progress toward goals

- ❖ Cascading effect of **Mission, Goals, Values**
 - *University - Division - School - Department - Unit - Employee*

Mechanisms for Managing Performance in a Dynamic, Competitive, and Aspirational Environment

❖ At the Employee/Team level

- **Performance Management:** **Process and tool** to facilitate the effective management of our human resources
 - Provides **line of sight** between employee goals and unit, department, school, division and University goals
 - Establishes a **meaningful context** for employee performance and contributions
- *What is the “Big Picture” and what is my role within it?*

Share Your Experience

- *What have you done to ensure performance objectives and goals have been communicated and achieved?*
- *What obstacles have you encountered?*
- *What has been helpful to you in that process?*

Performance Management



- ❖ An ongoing process based on structured dialogue about employee performance
 - Communicating performance expectations and standards
 - Recognizing strengths and contributions
 - Coaching performance in current role and preparing for longer-term career goals
 - Promoting staff engagement through goal setting and learning and development opportunities

Performance Management



Performance Management is based on:

❖ *Goals (the “What”)*

- Work Goals
- Professional Development Goals

❖ *Competencies (the “How”)*

- University Competencies
- Functional Competencies

Setting Work Goals and Professional Development Goals

- ❖ Goals must align with and support University and/or department goals
- ❖ To have the greatest impact, limit the number of goals for the coming year
- ❖ Goals should be “SMART”
 - Specific
 - Measurable
 - Attainable
 - Relevant
 - Time-specific
- ❖ Establish a clear action plan to achieve each goal
 - Action plans should include specific expected results and a target date for completion

Examples of SMART Goals

Not So SMART Goals

Work Goal

- ❖ Update the Facilities Management website

Development Goal

- ❖ Improve my written communication skills

SMART Goals

- ❖ Identify key pieces of information or sections that need to be maintained. Identify information providers and set weekly submission deadlines.
- ❖ Enroll in a business writing seminar through the consortium this semester. Receive progressively fewer managerial edits and rewrites; track progress and review samples with manager every six weeks.

Types of Work and Development Goals



- ❖ Special projects – unique or one-time assignments
- ❖ Ongoing projects – deepening understanding of responsibilities
- ❖ Specific tasks/activities – alone or as a member of a team
- ❖ Professional or career development

Competencies

❖ Definition

- ***Knowledge, skills, and abilities** described in behavioral terms that are observable, coachable and measurable, and critical to successful individual or organizational performance*

❖ Purpose

- *Describe **what is required to perform** particular roles within the University*
- *Describe an individual's **ability** to contribute in current/future roles*
- *Describe **how** results will be achieved*

❖ Informed by the Ignatian Tradition

- *Cura Personalis*
- *Cura Apostolica*

University Competency Model

Big Picture Perspective

The University- wide competencies describe what effective performance looks like at BC. These competencies are used throughout the performance management process and apply to all employees. Along with these, employee performance must support the unique mission of BC as reflected in our Ignatian tradition. By upholding this tradition, our values are strengthened.

Valuing Diversity

People Development

Continuous Learning

Communication

Team work

Openness to Change

Productivity

Applying Technology

Decision Making

Customer Focus

See detailed handout.

Performance Appraisal

- ❖ A formal tool to assess, discuss and document employee performance and goals
- ❖ Appraisal form comprised of:
 - Competencies
 - Work Goals
 - Professional Development Goals
 - Performance Summary
 - May include a Rating Scale

Appraisal Form - Competencies

Performance Attributes

Identify those performance attributes/competencies in the following table that are most pertinent to evaluating the employee's overall performance during the past year as well as those most relevant to the goals to be established for the next year. Reference these as you complete the goals section and the supervisor's comments section of the appraisal form.

Performance Attributes/Competencies		
Big Picture Perspective	Applying Technology	Continuous Learning
Communication	Valuing Diversity	Decision-Making/Problem Solving
Teamwork	Openness to Change	Customer Focus
Productivity	People Development	
Additional Performance Attributes/Competencies		

Appraisal Form - Goals

Past Year's Goals

State work goals and professional development goals, as defined in the introductory section of this form, and list results achieved. If no goals were formally set, please cite primary accomplishments.

Work Goals	Results Achieved/Primary Accomplishments
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Professional Development Goals	Results Achieved/Primary Accomplishments
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Next Year's Goals

List a limited number of [work goals and professional development goals](#) for the next year, as determined by supervisor and employee using the [S.M.A.R.T. goal](#) criteria, and identify specific actions needed to assist the employee in making progress. List also professional development goals that may pertain to the employee's longer term career growth and an action plan for facilitating progress.

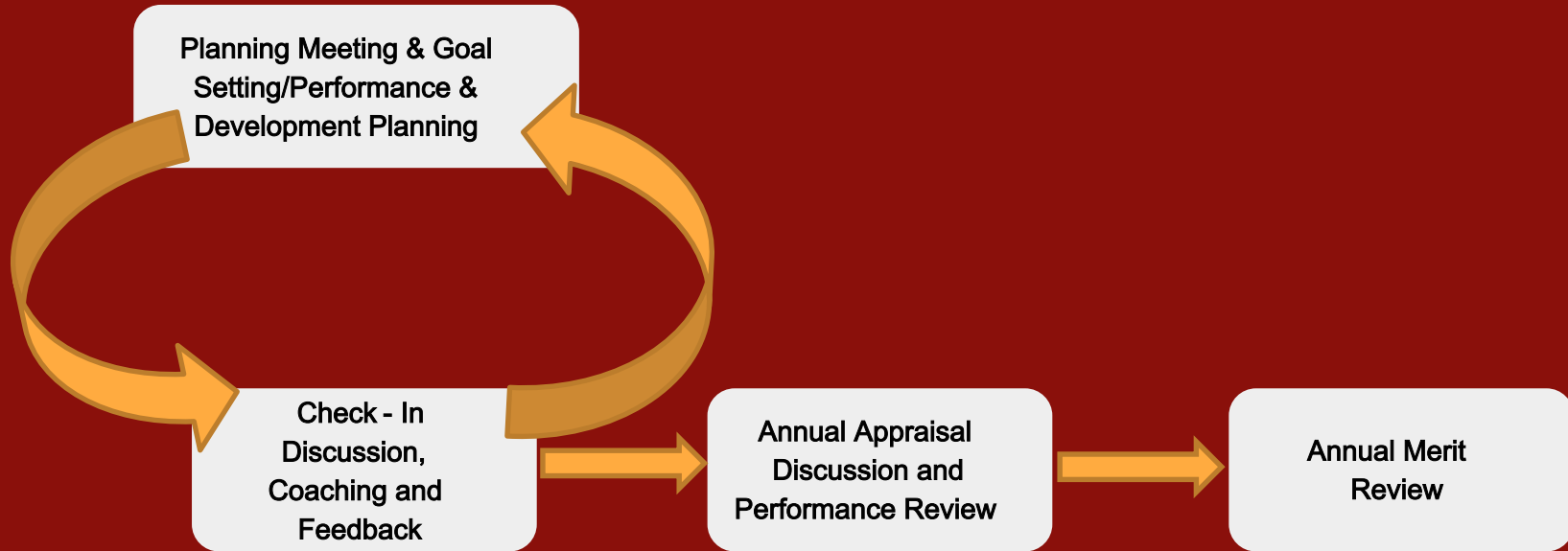
Work Goals	Actions Needed
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Professional Development Goals	Actions Needed
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The Appraisal Process

- ❖ Provides supervisors and employees the opportunity to view performance from multiple perspectives
 - Look *back* over past year's performance
 - Review *results* achieved
 - Look *forward* to next year's performance
- ❖ A shared responsibility
- ❖ Sets the stage for linking performance to merit salary increase

Employee/Supervisor Performance Management Cycle



Performance Appraisal DOs and DON'Ts

DO

Judge an employee's performance against job tasks and expectations defined in the performance plan

Allow the employee ample time to talk and engage in the discussion by asking open-ended questions

When improvement is needed, explain how failure to improve impacts the work unit and overall goals

See detailed handout.

DON'T

Compare one employee's performance against another employee's performance

Dominate the conversation and not allow the employee a chance to share their thoughts by asking close-ended questions

Explain the need to improve performance by saying, "because this is the standard" or "because I told you so"

Yearly Performance Management Calendar

February - March

1. Departmental meeting regarding goals for the year ahead
2. Review of work unit's objectives and activities
3. Review employee's role description
4. [Role Description Form](#)

March - April

1. Formal performance appraisal meeting between supervisor and employee
2. Supervisor/Employee agree on [work goals](#) and professional development goals
3. Supervisor/Employee agree on which performance attributes/competencies will require focus over the next year
4. [Appraisal form](#) completed and signed
5. Appraisal forms and merit increment recommendations to Department of Human Resources

April - October

1. Ongoing supervisor/employee discussions regarding progress made towards work goals and professional development goals

October - December

Half- year check point:

1. A scheduled meeting between supervisor/employee
2. Discuss performance
3. Review/revise work goals and professional development goals as needed

November - February

1. Ongoing supervisor/employee discussions regarding progress made towards work goals and professional development goals

Methods of Learning and Development

- ❖ On-the-job
- ❖ Readings (books, periodicals)
- ❖ Networking
- ❖ Coaching
- ❖ BC Employee Development programs
- ❖ Self-directed, computer-based learning
- ❖ Participating on task force, special project
- ❖ Benchmarking visit
- ❖ Shadowing others
- ❖ Professional Associations
- ❖ Symposia, lectures
- ❖ Community organization involvement
- ❖ Cross-training, job “swapping”
- ❖ Mentoring others
- ❖ Being mentored
- ❖ Classroom training, courses
- ❖ Becoming a “University Citizen”
- ❖ The Boston Consortium programs
- ❖ Others?

Discussion and Action Items for You

Determine how you will prepare for the upcoming performance appraisal

- Identify departmental process for conducting appraisals
- Review past year's work/development goals (if applicable)
- Review past year accomplishments and challenges
- Review progress towards competency development
- Identify items for discussion with supervisor or employee
- Identify next year's work/development goals
- Identify three to four competencies related to development goals
- Identify resources needed to achieve goals

A low-angle photograph of a large, ornate stone building, likely a church or university hall, featuring a prominent clock tower with Gothic-style windows and spires. The building is constructed from light-colored stone with white mortar. In the foreground, out-of-focus white flowers with green leaves are visible, framing the bottom and right sides of the image. The sky is a pale blue with soft, wispy white clouds. The text "Thank you!" is centered in the upper half of the image in a large, black, sans-serif font.

Thank you!