FY19 New Performance Valuation Overview

Encouraged But Optional for FY19

Preview of FY19 Performance Valuation

Goals for today

I. Preview major changes from FY18 to FY19
II. Share information on upcoming support sessions
III. Q&A

The case for changing how we approach ‘Evaluations’

Where did feedback come from?

- Performance Management Pilot (1000 people)
- Roadshows (LSA, Athletics, Student Life, Ross, etc)
- Q&A Sessions (250 people)

What are people saying, & what do they want?

- **Less evaluative**, and more conversational
- Make the process ‘**easy**’ for me to follow
- Give me more **flexibility**

Let’s look at the VALUE people bring to our institution & encourage more continuous & impactful conversations throughout the year!

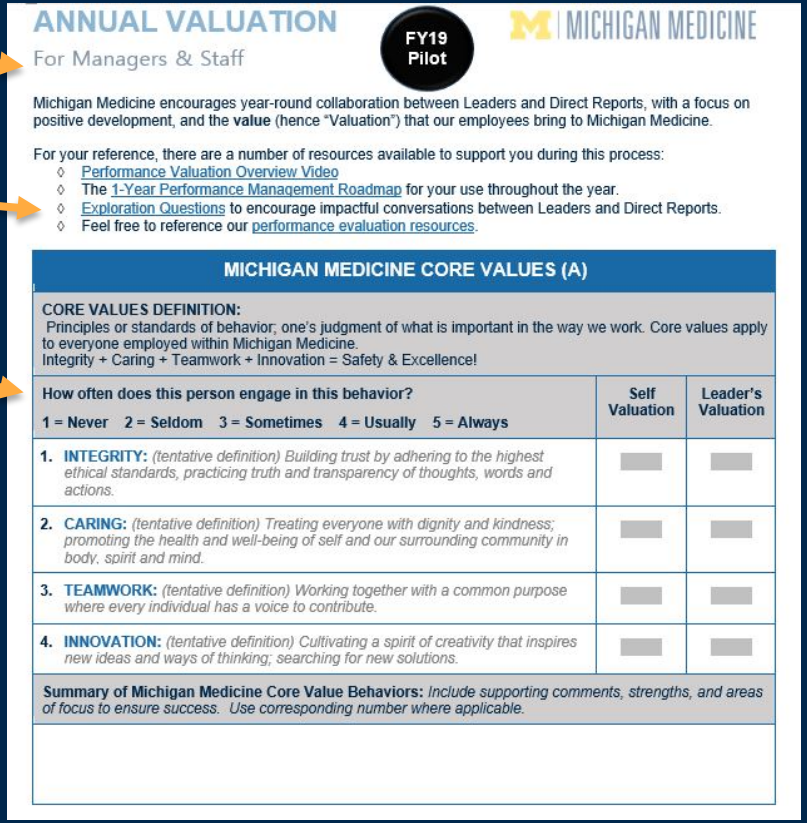
Major changes to the Valuation for FY19

You SPOKE, We LISTENED

New look and feel!

Easier to follow

Less evaluative



ANNUAL VALUATION

For Managers & Staff

FY19 Pilot

MICHIGAN MEDICINE

Michigan Medicine encourages year-round collaboration between Leaders and Direct Reports, with a focus on positive development, and the **value** (hence "Valuation") that our employees bring to Michigan Medicine.

For your reference, there are a number of resources available to support you during this process:

- Performance Valuation Overview Video
- The 1-Year Performance Management Roadmap for your use throughout the year.
- Exploration Questions to encourage impactful conversations between Leaders and Direct Reports.
- Feel free to reference our performance evaluation resources.

MICHIGAN MEDICINE CORE VALUES (A)

CORE VALUES DEFINITION:
Principles or standards of behavior; one's judgment of what is important in the way we work. Core values apply to everyone employed within Michigan Medicine.
Integrity + Caring + Teamwork + Innovation = Safety & Excellence!

How often does this person engage in this behavior? 1 = Never 2 = Seldom 3 = Sometimes 4 = Usually 5 = Always	Self Valuation	Leader's Valuation
1. **INTEGRITY:** *(tentative definition) Building trust by adhering to the highest ethical standards, practicing truth and transparency of thoughts, words and actions.*		
2. **CARING:** *(tentative definition) Treating everyone with dignity and kindness; promoting the health and well-being of self and our surrounding community in body, spirit and mind.*		
3. **TEAMWORK:** *(tentative definition) Working together with a common purpose where every individual has a voice to contribute.*		
4. **INNOVATION:** *(tentative definition) Cultivating a spirit of creativity that inspires new ideas and ways of thinking; searching for new solutions.*		

Summary of Michigan Medicine Core Value Behaviors: *Include supporting comments, strengths, and areas of focus to ensure success. Use corresponding number where applicable.*

Major changes to the Valuation for FY19

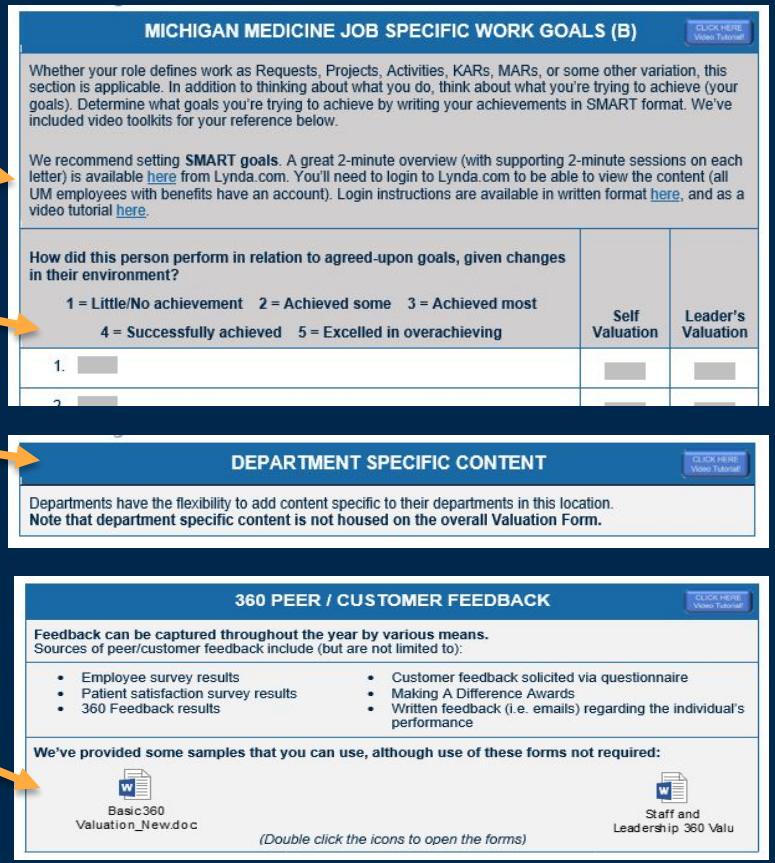
You SPOKE, We LISTENED

Easier to follow

Less evaluative

More flexible

Easier to follow



MICHIGAN MEDICINE JOB SPECIFIC WORK GOALS (B)

Whether your role defines work as Requests, Projects, Activities, KARs, MARs, or some other variation, this section is applicable. In addition to thinking about what you do, think about what you're trying to achieve (your goals). Determine what goals you're trying to achieve by writing your achievements in SMART format. We've included video toolkits for your reference below.

We recommend setting **SMART goals**. A great 2-minute overview (with supporting 2-minute sessions on each letter) is available here from Lynda.com. You'll need to login to Lynda.com to be able to view the content (all UM employees with benefits have an account). Login instructions are available in written format here, and as a video tutorial here.

How did this person perform in relation to agreed-upon goals, given changes in their environment? 1 = Little/No achievement 2 = Achieved some 3 = Achieved most 4 = Successfully achieved 5 = Excelled in overachieving	Self Valuation	Leader's Valuation
1.		

DEPARTMENT SPECIFIC CONTENT

Departments have the flexibility to add content specific to their departments in this location.
Note that department specific content is not housed on the overall Valuation Form.

360 PEER / CUSTOMER FEEDBACK

Feedback can be captured throughout the year by various means.
Sources of peer/customer feedback include (but are not limited to):

- Employee survey results
- Patient satisfaction survey results
- 360 Feedback results
- Customer feedback solicited via questionnaire
- Making A Difference Awards
- Written feedback (i.e. emails) regarding the individual's performance

We've provided some samples that you can use, although use of these forms not required:

Basic360 Valuation_New.doc

Staff and Leadership 360 Valu

(Double click the icons to open the forms)

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- Less evaluative
- More flexible
- Easier to follow

FUTURE-FOCUSED EMPLOYEE DEVELOPMENT (C) CLICK HERE Video Tutorial

For this portion of the Valuation form, employee and leader should complete their respective parts separately in preparation for their valuation review discussion.

EMPLOYEE: In the space below, answer the following questions to the best of your ability (feel free to use additional sheets if needed). These questions will be used as discussion prompts when you meet with your leader to review your progress from this past year and identify opportunities for your continued growth for the upcoming year.

1. In 1 year, what does career and professional success look like to you? *(Note: Success can also include staying in the same role, broadening knowledge or skillsets.)*
2. What are the 2 most important things that you need in order to achieve this professional success?
3. What are your biggest opportunities for professional development and how can your leader help?

LEADER: Review the Michigan Expectation Model. For a video explanation click here, or click on the graphic below. For a detailed view click here.

Reflect upon the strengths of the employee and answer the following question:

List two expectations where the employee shines, also include specific examples that support these strengths. Share this information with employee during your valuation discussion.

1.
2.

Major changes to the Valuation for FY19

You SPOKE, We LISTENED

Easier to follow

FUTURE-FOCUSED EMPLOYEE LEADER DISCUSSION TOOLS

EMPLOYEE AND LEADER: The following section should be used as an in-person discussion tool between employee and leader.

Now that you both have a had a chance to think about and discuss professional success for the next year and have identified the employee's strengths, the next step of the process is outlining an impactful and attainable development plan to achieve your goals.

One successful way of doing this is by committing to a variety of intentional development opportunities that align with U-M's Learning & Development Approach (see diagram below).

In collaboration with leader and employee, discuss what 2-3 leadership expectations are in alignment with the previously stated vision for success and strengths? (Refer to section C).

1.
2.
3.

Major changes to the Valuation for FY19

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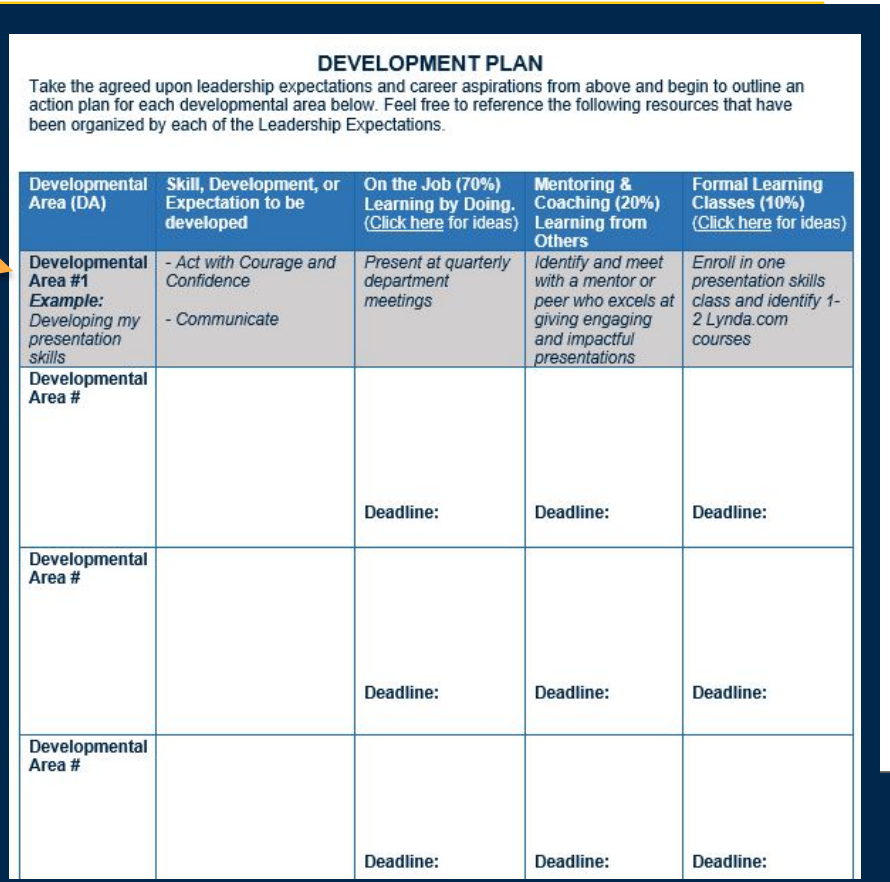

DEVELOPMENT PLAN

Take the agreed upon leadership expectations and career aspirations from above and begin to outline an action plan for each developmental area below. Feel free to reference the following resources that have been organized by each of the Leadership Expectations.

Developmental Area (DA)	Skill, Development, or Expectation to be developed	On the Job (70%) Learning by Doing. (Click here for ideas)	Mentoring & Coaching (20%) Learning from Others	Formal Learning Classes (10%) (Click here for ideas)
Developmental Area #1 ***Example:*** *Developing my presentation skills*	*- Act with Courage and Confidence* *- Communicate*	*Present at quarterly department meetings*	*Identify and meet with a mentor or peer who excels at giving engaging and impactful presentations*	*Enroll in one presentation skills class and identify 1-2 Lynda.com courses*
Developmental Area #		**Deadline:**	**Deadline:**	**Deadline:**
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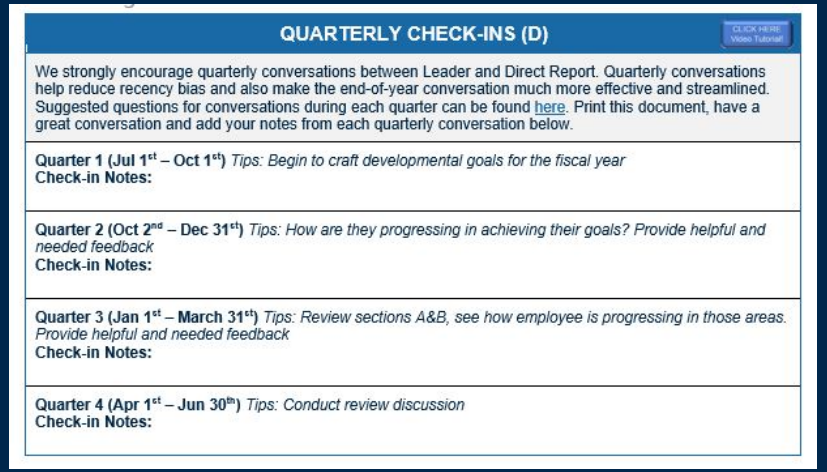


QUARTERLY CHECK-INS (D)

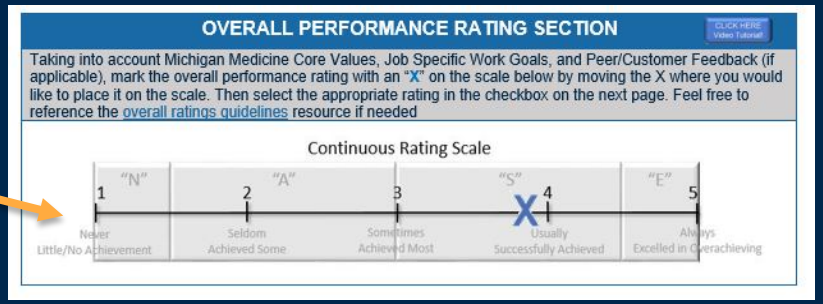
We strongly encourage quarterly conversations between Leader and Direct Report. Quarterly conversations help reduce recency bias and also make the end-of-year conversation much more effective and streamlined. Suggested questions for conversations during each quarter can be found here. Print this document, have a great conversation and add your notes from each quarterly conversation below.

Quarter 1 (Jul 1st – Oct 1st) *Tips: Begin to craft developmental goals for the fiscal year*
Check-in Notes:

Quarter 2 (Oct 2nd – Dec 31st) *Tips: How are they progressing in achieving their goals? Provide helpful and needed feedback*
Check-in Notes:

Quarter 3 (Jan 1st – March 31st) *Tips: Review sections A&B, see how employee is progressing in those areas. Provide helpful and needed feedback*
Check-in Notes:

Quarter 4 (Apr 1st – Jun 30th) *Tips: Conduct review discussion*
Check-in Notes:



OVERALL PERFORMANCE RATING SECTION

Taking into account Michigan Medicine Core Values, Job Specific Work Goals, and Peer/Customer Feedback (if applicable), mark the overall performance rating with an "X" on the scale below by moving the X where you would like to place it on the scale. Then select the appropriate rating in the checkbox on the next page. Feel free to reference the overall ratings guidelines resource if needed

Continuous Rating Scale

Performance Mgt Roll Out Plan for FY19 & FY20

FY19

- Performance Valuation encouraged but optional. ”Old” Staff and Leadership forms can be used instead if desired. All documents are posted on the HR Performance Evaluation Resources site.
- Performance Valuation Overview video available On-Demand
- Hosting **“SMART Goal Setting” sessions:** Mar 14 (8-10 NCRC), May 20 (2-4 Danto), Jun 21 (2-4 Danto), Jul 16 (8-10 Danto), Aug 16 (2-4 NCRC) ← Login to My LINC (Class: MMHR_BPPM13000) or Contact Tarnisha McLaughlin
- Hosting **Best-Practice sessions:** May 8 (3-5pm Danto), May 29 (1-3pm Danto), June 6 (8-10am Med Sci 1), June 26 (8-10am NCRC) ← Sign Up Here or Contact Whitney Williams
- Hosting **In-Person Performance Valuation Overview & Support:** Apr 24 (12-1:30pm NCRC), May 17 (8-9:30 Ford Aud), Jun 10 (12-1:30pm Ford Aud) ← Just show up or Contact Brian Cole

FY20

- Performance Valuation replaces “Old” Staff and Leadership forms
- Quarterly Best-Practice sessions focusing on topics of focus for that quarter

Feedback & Q&A

Thank you for your time!

Bonus: A video preview of the FY19 Valuation is available here.