

Performance Management at the School of Education



1

Goal Setting



2

Importance of Setting Goals



- Creating clear and flexible career goals between you and your employee is an important step to do together
- The employee will own the career goals but the supervisor needs to create time and space to realize the goals
- Managers can support each unique plan with regular check-ins and encouragement

3




Setting Goals

SMART Goals

Specific Specific position duties, goals or expectations	Measurable How will this be measured?	Achievable What tools and resources do you need to achieve the goal?	Relevant How does this goal support you (the employee) and our organizational mission and vision?	Time Sensitive When do we want to accomplish this goal?
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- Spend two days per month building my customer understanding by shadowing my teammates in Operations and Sales; deliver write up at the end on key learnings to share with the rest of the team
- Streamline
- Incorporate personal career/development goal(s)
By the end of the quarter, complete coursework and pass CPA certification


4



Performance vs Career

<p>Performance Goal</p> <ol style="list-style-type: none"> 1. Tied to specific tasks or projects at work 2. More immediate future orientated (e.g. 6 months-2 years) 3. Can adjust, change, and evolve based on work 4. Narrow in focus (e.g. complete project) 	<p>Career Goal</p> <ol style="list-style-type: none"> 1. Not explicitly connected to work tasks 2. Longer term future dreams or ideas to expand their career 3. Will adjust, change, and evolve based on employee needs 4. Broader focus (e.g. complete degree program)
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5



Incorporating Equity, Diversity and Inclusion (EDI)


- Critical strategic priority for School of Education
- Align with unit-level guidelines
- Individual goal for EDI-Professional Development activities – 4 hours minimum

6



Process & Documentation


7



School of Education Performance Management & Development Program (PMDP) Schedule

Annual Evaluation Period	July 1 – June 30
Goal Setting and Expectation Review	A-Basis June 1 – August 15
	C-Basis August 1 – September 15
Midpoint Check-in	February 15
Summary Evaluation	A-Basis August 15
	C-Basis May 15


8



How to document in the evaluation

- Document what has already been discussed during regular check-in meetings
- Meant to be a summary of the time period and not too lengthy
- Be specific and candid:
 - *John has provided excellent customer service over the last year and I regularly receive positive feedback. There have been some instances where he has agreed to unrealistic deadlines that the team was unable to meet. I would like him to improve his approach by asking more specific questions about what is needed to provide realistic deadlines.*
- Should not come as a surprise


9



Midpoint Conversation

- Evaluate performance against job expectations from July 1st – December 31st
- Discuss goal progress and adjust if appropriate


10



Summary Evaluation

- Encompasses performance over the full year
- Build from goal setting and midpoint conversations
- Discuss goals and expectations for the next year
- Employee will complete self-appraisal prior to evaluation being finalized

11



Performance Ratings

- **Exemplary** – there should be specific examples to back up excellence and/or unique contributions
- **Developing** - employees new to their role or a responsibility will likely have this rating – this is not negative and should include examples of how to get to a successful rating
- **Partially Meeting** – this may be appropriate for inconsistent performance or where there is good performance but some improvement is needed
- **Not Meeting** – include specific examples and be clear about what success looks like
- Use this guide to ensure consistency: [PMDP Rating Scale Guide \(wisc.edu\)](https://www.wisc.edu/pmdp-rating-scale-guide)

12



Probationary Performance Evaluations

- Begin with Thirty Day Conversation to set expectations and goals
- Mid Probation Conversation should take place at the midpoint of the probationary period (3 month mark for 6 month probationary period and 6 month mark for 12 month probationary period)
- Address performance concerns early and consult with Human Resources
- After completion of Summary Probation Evaluation, include employee in normal PMDP schedule

13



Performance Management Conversations

- Set aside time for focused, specific and confidential discussion
- Face to face either in person or virtually
- Plan for the discussion in advance
- Use relevant examples to illustrate thought process behind ratings (detailed examples do not need to be documented within the evaluation)
- Share feedback and allow space for employee feedback as well
- Suggest specific changes the employee can make to go from, for example, a Partially Meeting to a Successful rating

14



Things to avoid

- Discuss behaviors, not attitudes – don't assume you know what the employee is feeling
- Making inferences or conclusions – stick to the facts
- Do not refer to the employee's age, sexual orientation, ethnicity, politics, disabilities, medical conditions/leaves (FMLA/accommodations), etc.

15

How to mitigate ongoing performance issues



- Regularly scheduled check-ins
- Timely and direct feedback
- Clarity of expectations
- When there are division or department changes that impact job/performance expectations, have a conversation with the employee about the changes to ensure alignment on expectations
- Assess training needs and options
- Consult with Human Resources for guidance

16

Employee Engagement



- Incorporate recognition into one on one or team meetings
- Allow flexibility wherever possible
- Talk about personal development regularly and create goals together that allow them to stretch or enhance their skills
- Find out what things they enjoy working on and identify opportunities to engage them in those areas
- Engage them in decision making where possible by asking for input and ideas

17

Pay for Performance



18

Pay for Performance

- In our [Salary Administration Guidelines \(SAG\)](#) pay for performance is defined as:
"A pay approach where an employee may receive an increase to their salary based on job performance. It should be based on measurable, equitable, fair and reasonable objectives that have been thoroughly explained to the employee in advance and measured with a valid and reliable evaluation tool by a trained manager."
- Evaluations are critical to document and provide tangible examples of performance

19

Pay for Performance

With the rollout of TTC and market informed salary grades, UW-Madison has been encouraging Schools, Colleges and Divisions across campus to take steps towards providing regular, smaller incremental raises based on performance.


20

Pay for Performance

How are pay increases determined based on performance?


Performance	Emerging in Grade (Compa-Ratio Less than 85% OR PIR Less than 25%)	Established in Grade 85-95% PIR 25-50%	Advanced in Grade 95-100% PIR 50-75%
Exemplary	4-6%	3-5%	1-3%
Meets Expectations	3-5%	2-4%	0-2%
Needs Improvement	0%	~1%	~1%

21



Bias Awareness


22




What is bias, implicit (unconscious) bias?

- Bias: inclination in favor of or against someone or something
- Implicit bias: when we have attributions of qualities to members of different social identity groups without our conscious knowledge
- Can be both positive and negative
- Everyone has implicit biases

23



Ladder of Inference



I take actions based on beliefs	Now What?
I adopt beliefs about the world	
I draw conclusions from assumptions	So what?
I make assumptions based on meaning	
I add cultural & personal meaning	
I select data from observations	What?

The Liberators Developed by Keith McCandless & Henri Lipmanowicz. Based on work by Chris Argyris.

24

Why it occurs:

01
We seek out patterns: the human brain has a natural tendency to look for patterns and associations

02
We take short cuts: our brains tend to simplify and generalize the world around us

03
Experience and Social Conditioning: may be personal experience, but cultural conditioning, media portrayals, and upbringing contribute to implicit bias

25

How to manage and reduce bias:

- You have the ability and power to change your perceptions
- Create empathy
- Encourage interactions among people from different backgrounds
- Encourage continued learning

What is bias, implicit (unconscious) bias?

- Bias is a preference in favor of an opinion, person or something
- Implicit bias refers to the automatic or unconscious feelings or attitudes that we have towards certain groups of people without our conscious awareness
- Can be both positive and negative
- Everyone has implicit biases

26


Battling Implicit Bias

1
Implicit Bias training is shown to reduce unconscious bias, but research on its longevity is still ongoing
Some implicit bias trainings are shown to increase implicit bias.

2
Effects of training and awareness generally lasts 2-3 days after training


3
Important to continue to frequently review implicit bias materials, check in on your awareness and talk about it

27



PMDP Resources


28



How HR Can Help you

- Consult with Human Resources to understand how to properly document performance concerns and next steps
- Discuss probationary concerns
- Collaborate on professional development or training opportunities
- SoE PMDP questions - reach out to your HR Manager
- For complex performance issues:
 - Tammy Wacek
 - Dylan Smith
 - Alicia Andrewjeski

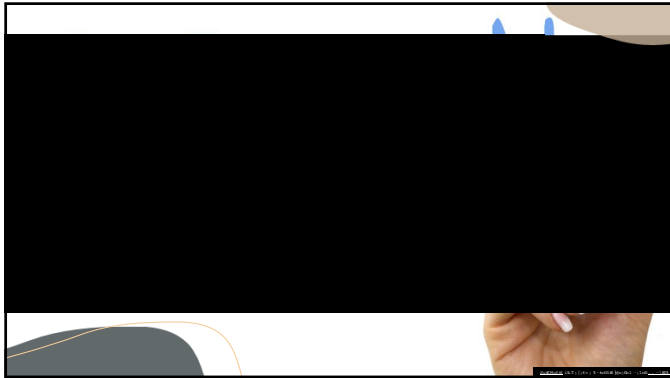
29



Additional Resources





- [Retaining Employees through Total Rewards](#) (approx. 15 min)
- [Pay Progression](#) (approx. 30 min)
- [Performance Management Toolkit – Human Resources – UW-Madison \(wisc.edu\)](#)
- School of Education PMDP Toolkit: [Performance Management - Business Office \(wisc.edu\)](#)

30



31

Different Types of Bias

Type of Bias	Definition	Example of Bias
In-Group bias 	The tendency for people to give preferential treatment to others who belong to the same group as they do.	Stakeholders may be biased towards employees with similar background and provide positive feedback for them.
Confirmation Bias 	Searching for, interpreting, emphasizing and recalling information in a way that confirms one's preconceived notions.	Managers may consider only those parts of feedback which reinforce their previously held beliefs about their direct report and ignore the rest.
Halo/Horns Effect 	Allowing a person's positive or negative traits to "spill over" from one personality area to another in one's perception of them.	Managers may allow one strength or weakness of their direct report to cloud their overall judgement.
Actor-Observer Bias 	The tendency to attribute one's own behavior to external influences and other person's behavior to internal ones.	Stakeholders may be unfairly harsh in providing feedback for employees who were involved in bad situations through no fault of their own.





Source: Gartner

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32

Different Types of Bias

Type of Bias	Definition	Example of Bias
Availability Bias 	The tendency to rely on information which comes readily to mind when making decisions or evaluating situations.	Managers may prioritize what they have observed in their direct report over what stakeholders say in their feedback.
Recency Effect 	The tendency to remember the most recently presented information, impressions or items better than the material presented earlier.	Stakeholders may provide positive feedback for employees who have successfully executed a big project recently, ignoring performance in the period before.
Loss Aversion 	The tendency to prefer avoiding losses over acquiring equivalent gains.	Stakeholders may refrain from listing development areas for employees to avoid risking their relationship with them.
Bandwagon Effect 	The tendency to do or believe things because many other people do, often due to a desire for harmony or conformity in a group.	Managers may start believing something about an employee just because multiple sources of feedback say so, despite having evidence to the contrary.

Source: Gartner

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33



Resources/Sources

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- B v j f f f l e s t T i j f ; f i j v f · f l - v a f l S f i a v v t
- [Harvard Business Review: Unconscious Bias Training that Works](#)
- [Verywell: How Does Implicit Bias Influence Behavior?](#)
