



CLEAR | TIMELY | MEANINGFUL

Rethinking our approach to staff evaluations



Today's Meeting

- Explain UF Engaged
- Answer Your Questions

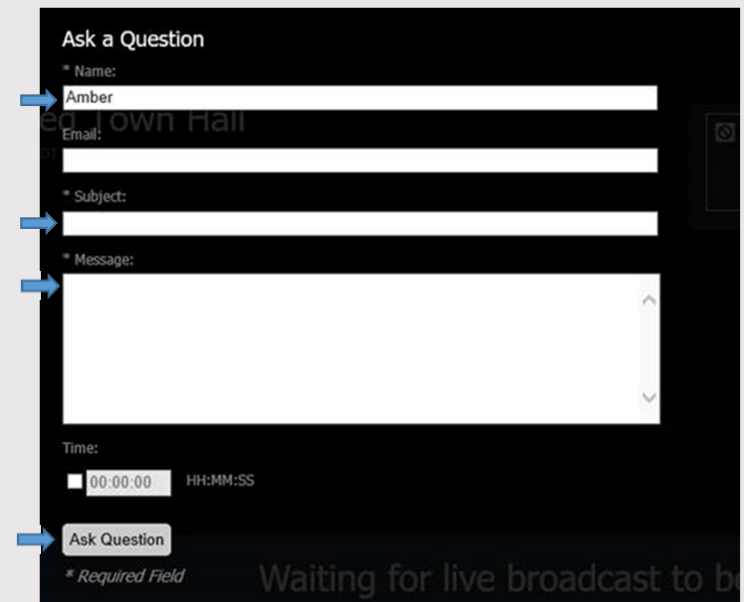
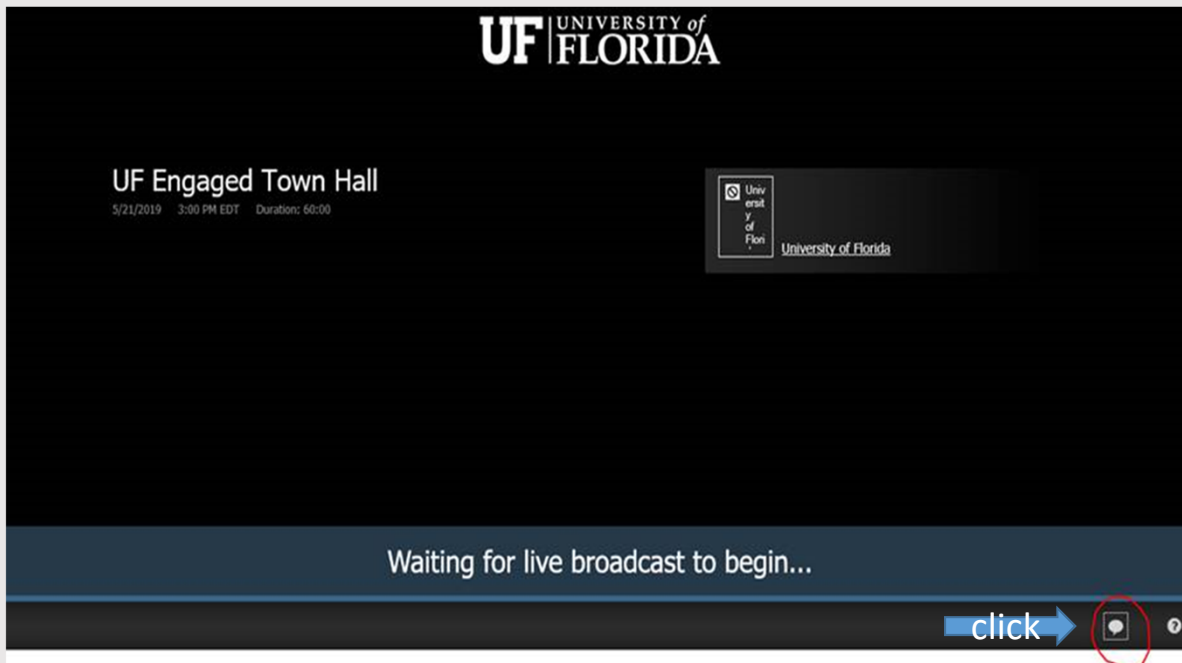
But First ...

- Review Current State

- If you are joining us remotely, a quick word ...

Mediasite

Question feature is on. Click on the conversation icon at the bottom.





UFHR Strategic Commitment

- We will support UF's efforts toward preeminence through an aligned and contemporary approach to performance management that focuses on fostering high performance
- **Short-Term Priorities**
 - Align performance program with best practices, including:
 - Alternatives to performance review process
 - More agile approaches to addressing performance needs when different results are needed

... the biggest limitation of annual reviews ...

They hold people accountable for past behavior at the expense of improving current performance and grooming talent for the future, both of which are critical for organizations' long-term survival.

In contrast, regular conversations about performance and development change the focus to building the workforce your organization needs to be competitive both today and years from now.



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The Performance Management Revolution
Harvard Business Review, October 2016, Peter Cappelli, Anna Tavis



Current State

- The current system was implemented in 2003
 - Paper
 - Two forms—one for nonexempt/hourly, one for exempt/salaried
 - Five ratings
- Seen as a frustrating exercise to employees and leaders alike
- Does not lead to desired outcomes in proportion to time invested
- Voluntary in 2018 and 2019
 - Departments continue to use despite the flaws of the appraisal process and form

Understanding the Landscape



- Higher education
 - Review of practices at Top 10 and other universities
- University of Florida performance management informal survey



We Asked ...

- Supervisors (721 responses):
 - 32% Moderately/27% slightly effective
 - 33% Somewhat satisfied/30% somewhat dissatisfied
 - Appraisals once a year seen by many as the right timing
 - Comments suggest an understanding that feedback needs to be more frequent



We Asked ...

- While 85% of UF supervisors noted that they were extremely comfortable delivering positive feedback
- Only 32% were comfortable delivering constructive yet critical feedback
- And 18% were not at all comfortable delivering constructive yet critical feedback



We Asked ...

- Employees (2682 responses):
 - 40% Moderately effective (although 20% thought not effective at all)
 - 33% reported that their supervisors do not give them feedback outside of the appraisal process (21% said weekly/biweekly)
 - Comments suggest that appraisals can be seen as negative or empty experiences or “a joke”
 - Supervisory evaluations/360s
 - Management training
 - Wide variation in views about the link between pay and evaluations



We Asked ...

- Aside from the annual process, how often do you give/receive informal feedback throughout the year?
 - 44% of supervisors: Give informal feedback “weekly/biweekly”
 - 27% of supervisors: Give informal feedback “monthly”
 - 21% of employees: Receive informal feedback “weekly/biweekly”
 - 33% of employees responded they “don’t get any feedback at all”



Understanding the Landscape

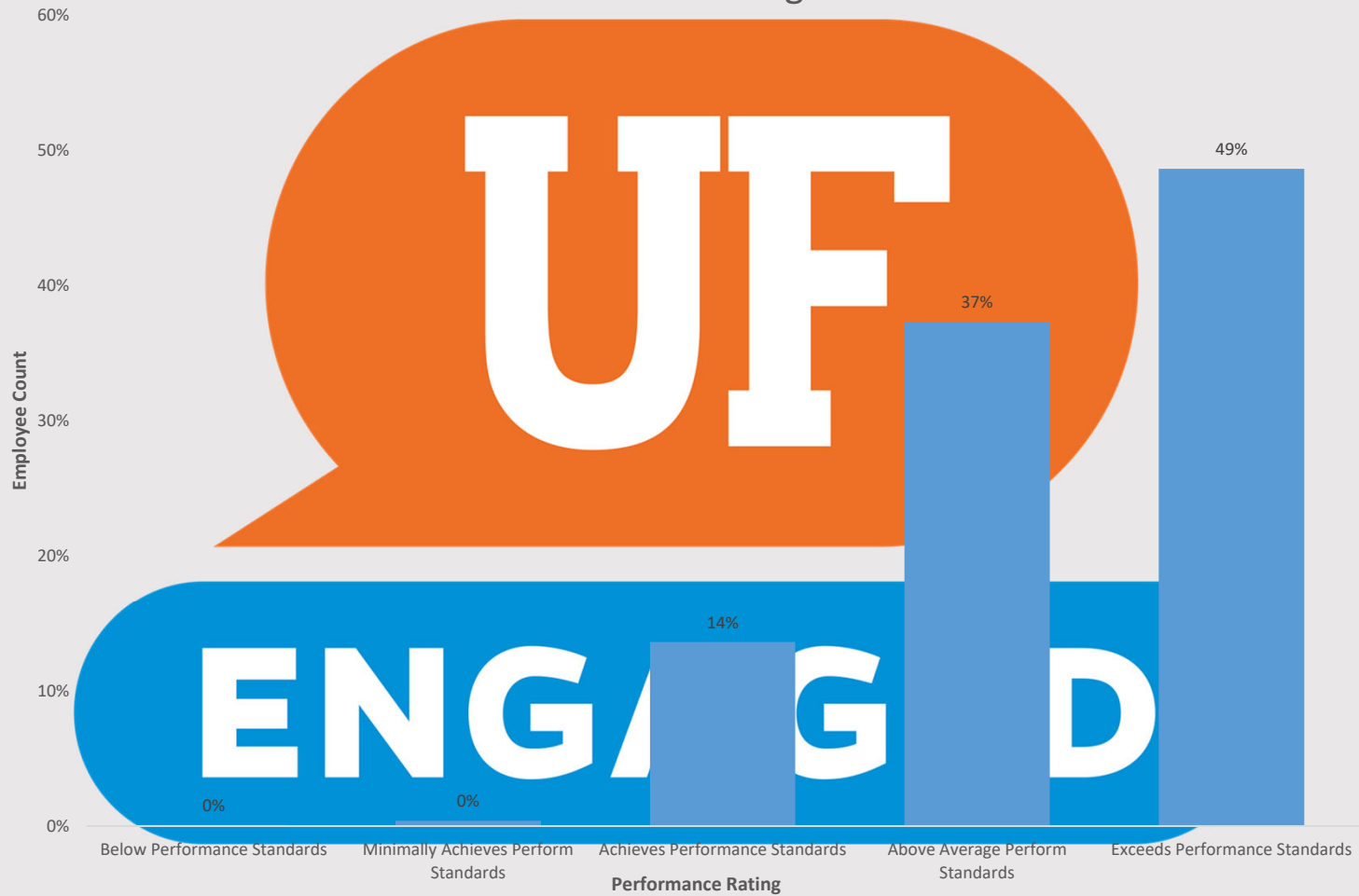
- Trends in private industry
 - The employers that have recognized the need to radically change their performance management models have focused on developing a culture of engagement and have used simple technology to facilitate that development, rather than refining a current process
- Huron Consulting: “Performance management is management.”



It's About Performance

- In general, we have lost sight of why we complete performance evaluations
- Designed to improve performance because employees understand what's expected and how they are doing in relation to those expectations
 - More frequent conversations about performance are needed to strengthen a meaningful relationship between employees and their leaders to recognize excellence and redirect employee efforts when necessary
- Some of us also “back into” evaluations and ratings in order to justify merit increases

Distribution of Performance Rating for Current Staff





It's About Performance

- Our system has been encouraging ineffective leadership behaviors:
 - An HR-centric process
 - Once a year
 - With (most certainly) stale feedback
- With UF Engaged:
 - More frequent, shorter conversations about the work—Just four times a year
 - What's going well?
 - What needs to improve?
 - Future focus: What's next?
 - Effective leaders are having these conversations already—so for many of us, this will just be a useful reminder to be more intentional
 - For others of us ...



UF Engaged—How It Will Work

- Structured quarterly check-in, with dates tied to the anniversary date of when the employee started the position
 - Distributes the leader’s workload throughout the year and avoids a single “due date” for check-ins
- Frequent check-ins will encourage a shift in the culture to continuous engagement rather than an annual evaluation “event”



UF Engaged—How It Will Work

Quarterly Check-In Schedule

Current position start date:	Quarterly check-ins will be held by:
January	April, July, October, January
February	May, August, November, February
March	June, September, December, March
April	July, October, January, April
May	August, November, February, May
June	September, December, March, June
July	October, January, April, July
August	November, February, May, August
September	December, March, June, September
October	January, April, July, October
November	February, May, August, November
December	March, June, September, December

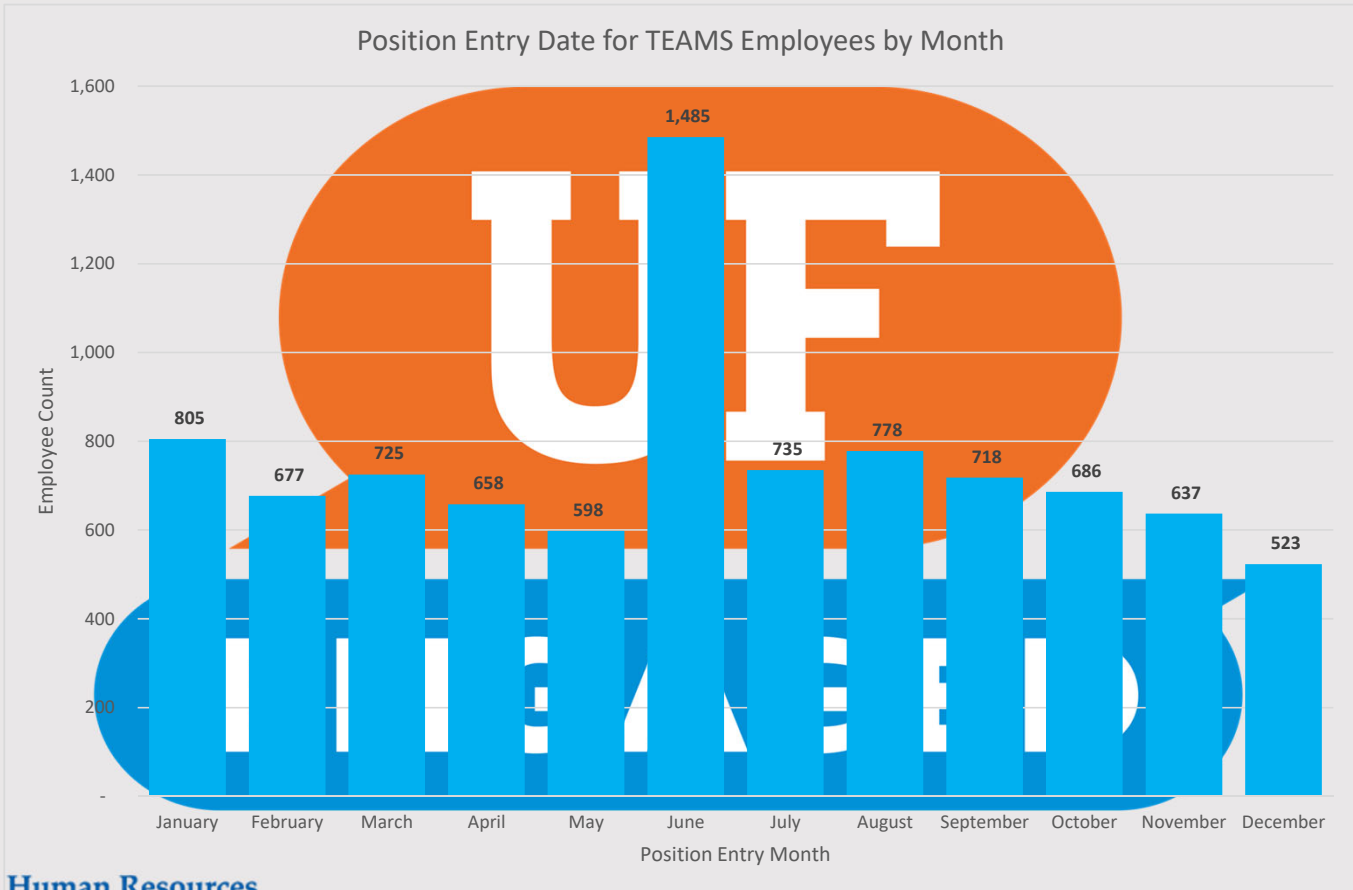


UF Engaged—How It Will Work

- Let's take a look at how this might work for an individual at UF:
 - Joe is an employee at the Florida Museum of Natural History.
 - Joe has worked for the University of Florida since September of 2008, but he moved from the Entomology Department to work for the Florida Museum on February 1, 2013.
 - So Joe's current position start date is February 1, 2013, and his first quarterly check-in will happen by November 1.
 - Joe's supervisor, Nancy, will receive an email in October alerting her that it is time to complete Joe's quarterly check-in.
 - Nancy will complete Joe's quarterly check-in during the month of October and submit by November 1.
 - November 2 will be the beginning of Joe's next quarter, and his next check-in will be held by February 1.



UF Engaged—How It Will Work





UF Engaged—How It Will Work

- Based on our research of best practices:
 - No longer be individual performance categories (work performance, attendance/reliability, etc.)
 - No rating levels
 - No annual evaluation
 - Paper replaced by simple-to-use technology
 - ePerformance 9.2 module in PeopleSoft (myUFL)

UF Engaged



- Reminders to prompt leaders about the quarterly check-ins
 - Provide a place for “Performance Notes” as a separate tool for personal notes, if you like, for easy access and recall
 - Probationary evaluation also incorporated into this process (2nd check-in)
 - A separate template will be available for performance improvement plans, if needed
- Employees will receive a reminder of the quarterly check-in and will have an opportunity to complete a self-assessment
- Pay guidelines will also be provided



Timeline

- General campus communication—Underway
- Leader/staff member accuracy check—May
- Town Hall—May 21, 3-4 p.m., Emerson Hall (streamed)
- Monthly communication to leaders—June
- Performance notes—July 15
- Town Hall—September
- System opens—October
- First round of check-ins—November

Questions?

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