

Personalized Performance Plan Job Aid

How to Use the Personalized Performance Plan Tool

Planning – The performance plan identifies what is expected (objectives and goals) and how the job should be accomplished (values). During the performance planning conversations supervisors and employees should:



- Establish and agree upon performance objectives and goals
- Define university values
- Discuss and set professional development goals
- Clarify what the employee will be evaluated on, and
- Set the stage for ongoing feedback and coaching throughout the year.

Step 1. Write Objectives Aligned with Strategic Goals

<p>Clear performance objectives are identified and communicated at the beginning and throughout the performance process. Performance objectives are the “what” you do. They describe what is expected of you. These performance objectives must align with unit and university goals and institutional values.</p>	<ul style="list-style-type: none"> • One Ohio State University • Students First • Faculty and Staff Talent and Culture • Outreach and Collaboration • Operation and Financial Soundness and Simplicity • Research Prominence
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How to write objectives:

Use an action verb	Make it measurable	Answer by when	Follow these criteria
<ul style="list-style-type: none"> • Increase • Complete • Conduct • Attain • Achieve 	<ul style="list-style-type: none"> • How much? • How many? • How much better? • How much faster? • Costs how much less? 	<ul style="list-style-type: none"> • Phase 1 by June 1 • Phase 2 by August 1 • By the 5th day of each month 	<ul style="list-style-type: none"> • Specific • Measurable • Action Oriented • Realistic • Time Bound

Step 2. Review University Values

<p>Employees and Supervisors:</p> <ul style="list-style-type: none"> • Discuss the values and their connection to the performance objectives • Review the aligning behaviors document at osu.edu/eminence/assets/files/aligning_behaviors • Define the behaviors associated with each value as it relates to the employee’s role 	<ul style="list-style-type: none"> • Excellence • Collaborating as One University • Acting with Integrity and Personal Accountability • Openness and Trust • Diversity in People and Ideas • Change and Innovation • Simplicity in our Work
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Step 3. Complete Professional Development Goals

<ul style="list-style-type: none"> • Identify one strong value to leverage (in what value does the employee already excel) and one to be developed (how might an employee strengthen their effectiveness) • Create an additional professional development goal such as obtaining a new skill, increasing knowledge, etc. • Write an action plan for each professional development goal 	<ul style="list-style-type: none"> • Refer to the performance management training and online tip sheets at hr.osu.edu/ohrc/learningdevelopment • Visit the excellence to eminence website for information on values and guiding behaviors • PM policy and guide
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Ongoing Coaching and Feedback – Feedback is information about observed behavior that is appreciative or constructive. Coaching is used by supervisors to help employees develop and use their talents for individual and institutional success. Feedback and coaching should occur regularly and include a discussion of professional development. Two formal check-in sessions must be documented on the performance tool. A simple and effective way to provide appreciative feedback and feedback to strengthen effectiveness is:

“What I appreciate about you is...” And
 “What I feel might help you be even more effective is...”

Employee Preparation	Supervisor Preparation
<ul style="list-style-type: none"> • Am I clear on what’s expected of me? • Are there examples of my successes that I want to share with my supervisor? • In what areas do I believe I am exceeding expectations, meeting expectations or below expectations? • What can I do to improve my performance? • How well am I meeting my objectives and goals? • What resources or support do I need from my supervisor? • Are there additional tasks or responsibilities I want to learn? • Do I have any concerns that should be shared with my supervisor? 	<ul style="list-style-type: none"> • What have I observed about this employee that I can compliment? • How could this employee improve their performance? • Is the employee meeting their objectives and goals? • Is the employee performing in ways that exemplifies the values? • Have I checked to see if there are any barriers that are preventing this employee from meeting their objectives? • Have I asked the employee how I can support them and what resources they might need from me? • Do I know what the employee’s career goals are?

Reviewing Performance – The performance review is the culmination of the performance process, focusing on areas of achievement, areas for improvement and goals for the future.

Preparing for the Discussion	Conducting the Discussion
<p>Employee:</p> <ul style="list-style-type: none"> • Gather last minute data on your performance • Complete a draft of the Personalized Performance Plan by: <ul style="list-style-type: none"> - Documenting actual results in performance objectives. - Documenting progress of professional development goals. - Review the values and aligning behaviors document. • Give your supervisor a copy of your Personalized Performance Plan draft before the meeting. • Write down questions you want to ask your supervisor. <p>Supervisor:</p> <ul style="list-style-type: none"> • Arrange for a quiet, private place to meet. Allow enough time to discuss their performance. • Review the employee’s completed Personalized Performance Plan. • Gather any data collected since the last check-in conversation. • Rate and document Performance Objectives and Values for an overall rating. • Review and document progress towards achieving professional development goals. 	<p>Employee:</p> <ul style="list-style-type: none"> • Use your completed Personalized Performance Plan as a guide for discussion; • Identify strengths and areas for improvement. • Identify areas for learning and development. • Discuss obstacles to performance and suggest solutions. • Listen to feedback and ask clarifying questions. • Sign the Personalized Performance Plan <p>Supervisor:</p> <ul style="list-style-type: none"> • Encourage the employee to share performance data; ask clarifying questions. • Share additional data (customer comments, peer feedback, etc.) collected since the last check-in conversation. • Discuss the employee’s strengths and areas for improvement. Set targets for improvement. • Finalize Personalized Performance Plan: <ul style="list-style-type: none"> - Indicate Overall Rating. - Encourage employee to provide comments on Personalized Performance Plan. - Sign and date Personalized Performance Plan. - Send the final Personalized Performance Plan to college/VP unit human resources. - Give a copy of the final Personalized Performance Plan to the employee.