



Performance Management

Aligning Performance
With Strategy

This Presentation:

- Reviews the 4 phases of Performance Management.
- Introduces user-friendly methods and tools to support each phase.
- Clarifies roles and expectations.

Why Performance Management?

- Our County Administrator, Jim Ley, requested a performance management system that is tied into organizational vision, mission, and goals while using performance measures.
- A performance management committee was formed to develop the new system with input from:
 - External consultants
 - Leaders
 - Employee focus group

What is Performance Management?

- “ A process for establishing a shared understanding about:
- a) what is to be achieved
 - b) how it is to be achieved, and
 - c) an approach of managing people that increases the probability of achieving success.”

The Power of Alignment



It starts with our **Vision:**

*Customer focused,
continuously improving,
accountable team.*

The Vision is Connected to the Core Competencies

VISION	CORE COMPETENCIES
Customer Focused	Customer & Community Champion
Continuously Improving	Process Improver & Capacity Builder
Accountable	Financial Manager
Team	Continuous Innovative Learner

A Business Plan Will Tell You...

- Where are we going? (*Vision*)
- Why are we going there? (*Mission*)
- How will we get there? (*Priorities, Outcomes, Goals*)

The answers to the above questions will help you determine:

- What is my part to play? (*Key Activities, Measures, Individual Development Plan*)

The Core Competencies are Connected to the Business Plan

VISION	CORE COMPETENCIES	BUSINESS PLAN
Customer Focused	Customer & Community Champion	Customer Perspective (exceed customer expectations)
Continuously Improving	Process Improver & Capacity Builder	Internal Process Perspective (better, cheaper, faster)
Accountable	Financial Manager	Financial Perspective (contain costs/increase revenue)
Team	Continuous Innovative Learner	Learning & Growth (high performance employees & teams)

The Core Competencies are Connected to the Business Plan

VISION	CORE COMPETENCIES	BUSINESS PLAN
Customer Focused	Customer & Community Champion	Customer Perspective (exceed customer expectations)
Continuously Improving	Process Improver & Innovator	Internal Process Perspective (faster, better, cheaper, faster)
Accountable	Financially Responsible	Financial Perspective (contain costs/increase revenue)
Team	Continuous Innovative Learner	Learning & Growth (high performance employees & teams)

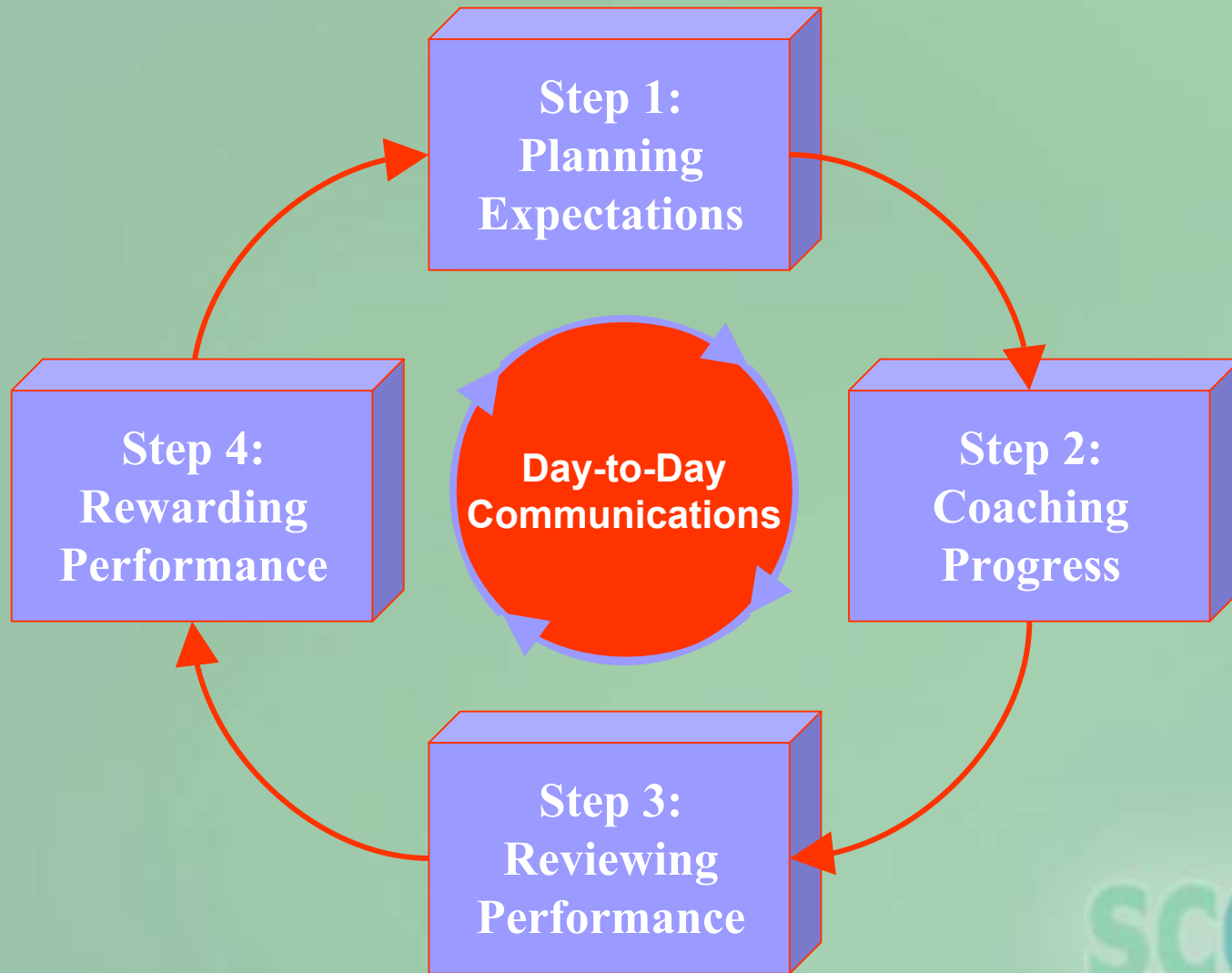
**PERFORMANCE
MANAGEMENT LINKS
IT ALL TOGETHER!**

Employee & Leader Resource Kits

Toolkits were provided to leaders and employees which included:

- Checklist for success
- Sample evaluation forms
- Business plan
- Other related information

The Performance Management Cycle



Step 1: Planning

Setting Clear Expectations



Step 1:
Planning
Expectations

Ensure that the employee has a clear understanding of:

- SCG’s future direction.
- Business center/unit’s future direction.
- Expected outcomes and key activities.
- Individual development needs.

Step 2: Coaching

Sustaining the Momentum...

Step 1:
Planning
Expectations



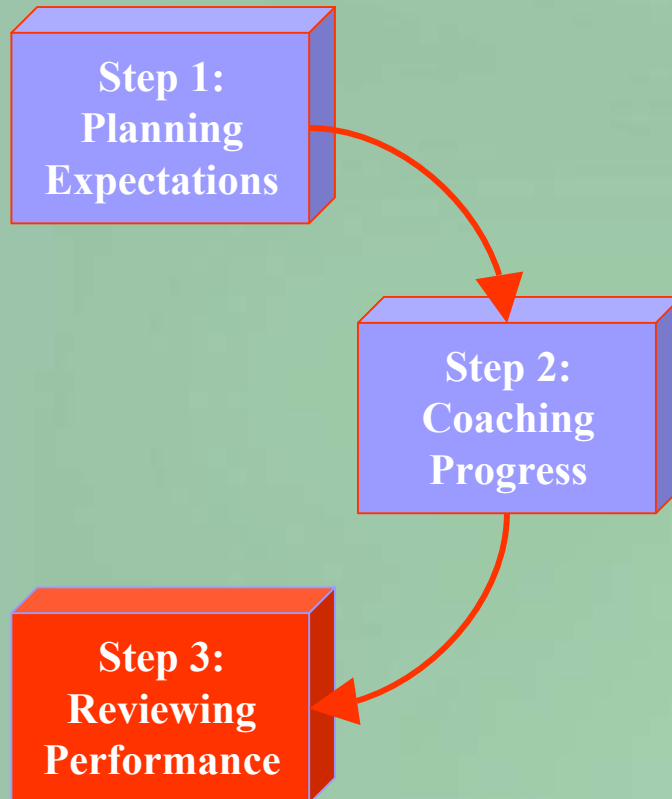
Step 2:
Coaching
Progress



- Establish effective, 2-way communication channels.
- Provide ongoing feedback.
- Observe and document behavior.
- Support progress toward the IDP.
- Modify commitments.

Step 3: Reviewing

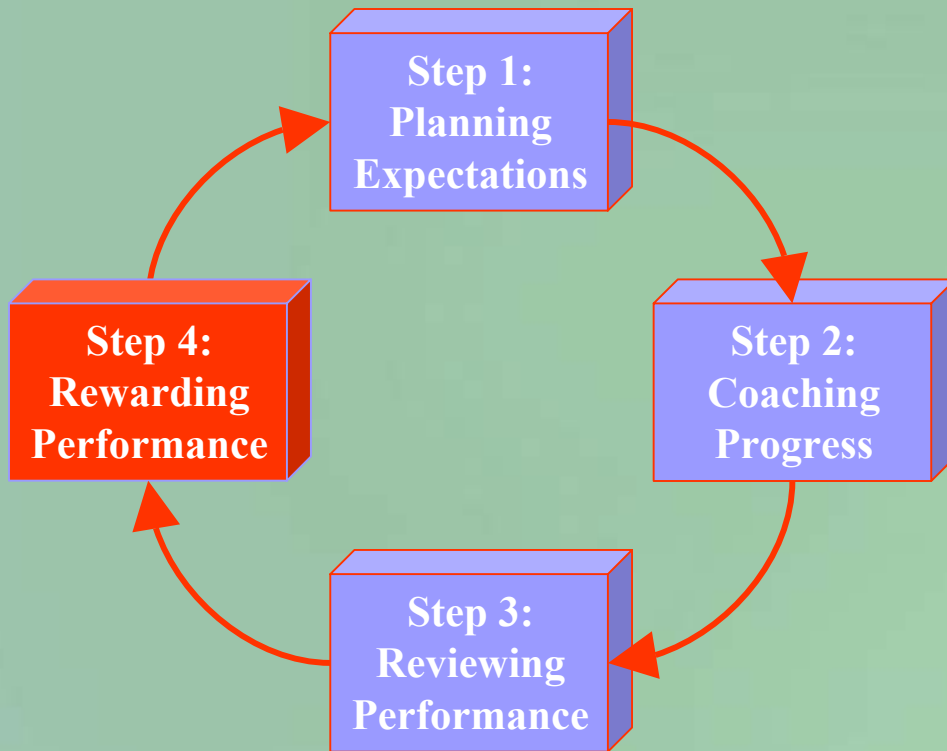
Focusing on Results



- Determine achievement of outcomes.
- Evaluate progress toward goals.
- Assess alignment with corporate values.
- Assess progress toward core competencies.

Step 4: Rewarding

Recognizing and rewarding peak performance



- Determine “compa-ratio” relationship to market.
- Assess overall performance of employee.
- Examine impact on overall budget.
- Consider additional motivational factors.

Note: “compa-ratio” is relationship of individual salary to mid-point of the market’s salary range

The Form Includes:

- Part A: Outline the specific outcomes/objectives (what the employee wants to achieve), and record the past year's results.
- Part B: Identify demonstrated behaviors related to the values and core competencies.
- Part C: Update the Individual Development Plan based on the career / job related objectives.

Rewarding for Performance

- Determine “compa-ratio” relationship to market.
- Assess overall performance of employee.
- Examine impact on overall budget.
- Consider additional motivational factors.

Performance-Based Decision Matrix

Non-Management

Performance Level	Below 90% of Market	Above 90% to 100% of Market	Above 100% to 110% of Market	Above 110% of Market
Recommended Percentage Increase on Base Rate				One-time Lump Sum *
Exceeds Performance	5-8%	3-6%	2-5%	3-8%
Achieves Performance	3-5%	1-4%	0-3%	0-5%
Below Expectations	0%	0%	0%	0%

Continuous Communication and Feedback

- Annual Evaluation Meeting
- Semi-Annual Review Meeting
- Quarterly Review Meeting

Note: Quarterly reviews are optional, but recommended. Employees should feel free to ask their supervisor for a quarterly review if one has not been scheduled.

Employee Preparation

*Employees need to take the initiative
to be prepared
to discuss their performance
during their evaluation meetings.*

Annual Evaluation Meetings

Part #1:

- Employee gives input on performance, strengths, opportunities, ideas.
- Supervisor gives input on performance, strengths, opportunities, ideas.
- Both employee and supervisor reviews written information on job-related performance measures, kudos, completion of training, etc.

Part #2:

- Review written evaluation summary, receive salary decision, agree on future performance activities and training opportunities.

The Supervisor's Role

- Continually engage in the performance management cycle.
- Meet twice a year with your employees.
- Schedule one-on-one meetings with your employees.
- Serve as a role model.

The Employee's Role

- Seek understanding re: future direction.
- Determine your “part-to-play”.
- Assess self.
- Seek learning and development opportunities.
- Update the IDP (Individual Development Plan).
- Plan future career goals.

Good leadership requires...

- Alignment: Tying it all together!
- Culture and Values: Living it out.
- Employees who have:
 - Clear expectations
 - Knowledge, skills, expertise
 - Resources to do the job
 - Coaching and feedback
 - Effective recognition/logical consequences

Leaders set the stage!

The performance management process helps to create a positive culture that upholds our values and produces positive results!



Organizational and Employee Development is designed to support large-scale change and continual improvement efforts across the enterprise. We offer organizational learning and development services that are strategic, consultative and operational in scope.

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