Performance Management Study

Focus Groups

The Singer Group
June 2017

We Appreciate Your Participation

Getting Started – Welcome!

- Singer Group introductions
- Participant introductions
  - Name
  - Title
  - Library
  - How long you've been with Metro
- Please. . .
  - State your name before speaking
  - Share any personal input as well as feedback related to your library or department

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Purpose of Today's Meeting

- Share background and update on performance management project

- Share preliminary design of the new performance management program

- Gather input, answer questions, and hear what you think!

- Confirm next steps
  - Project
  - Focus groups

NORMS – How We'll Work Together

✓ Safe place for questions, sharing, learning

- One speaker at a time
- Ask questions
- Participate
- Raise issues on the call
- Critique ideas, not people
- Attributable comments stay in the room

✓ Be present

✓ Listen actively

✓ Commit to doing the work

✓ Cellphones on vibrate

✓ Have FUN ☺

• Other?

Project Steps to Date

Information Gathering	Data Analysis/ Develop Core Competencies	Design System	Validate and Finalize System

- Met with PMC to identify project goals and priorities – Jan/Feb

- Conducted all-staff survey on PM and compensation - March

- Developed preliminary core competencies and program design – April/May

- Met with PMC to review design and develop recommendations to leadership – May

- Met with leadership team to review design and gather their input – May

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Core Competencies
Review and Recommendations

Core competencies are skills that all Metro employees need for success on the job

Staff Competencies – Final Draft Recommendations

- **Customer Service:** Develops and maintains effective relationships with customers and colleagues; demonstrates concern for and meets or exceeds the needs and expectations of external and/or internal customers

- **Communication:** Expresses and receives information and ideas successfully; demonstrates emotional intelligence to communicate effectively with individuals of varied backgrounds and interests; keeps abreast of Library activity and appropriately asks questions/shares input; keeps others informed about issues that affect them

- **Accountability:** Takes responsibility for results; acts as a responsible steward of resources; owns mistakes as well as successes and learns from both; takes ownership of emotions and manages conflict effectively

- **Teamwork:** Demonstrates the ability and desire to work cooperatively and foster team success; demonstrates empathy and respect for colleagues

- **Professional Development:** Identifies, develops, and applies the technical and interpersonal skills/knowledge needed for effective job performance; demonstrates ability to learn and use existing and emerging tools (including technology) to achieve job-related purposes or goals

Key Questions: Any key changes needed? Is anything major missing?

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Manager Competencies – Final Draft Recommendations

- **Performance Development:** Takes responsibility for staff's performance and results; coaches them to develop their capabilities; delegates significant responsibility and authority; allows employees freedom to decide how to accomplish goals and resolve issues; ensures regular feedback; addresses performance concerns appropriately; ensures a performance-enhancing environment where opinions and differences are heard, respected, and valued.

- **Change Management:** Demonstrates support for and agility concerning innovation and other changes needed to improve the organization's effectiveness; initiates, sponsors, and implements organizational change; helps others to successfully manage organizational change.

- **Strategic Thinking:** Creates alignment with Library Unbound, incorporating diverse inputs, such as internal/external advantages and threats, industry trends, emerging technology, existing and potential members, and stakeholder needs; demonstrates forward-thinking decision making and collaborates effectively across the System to advance the Library's goals

Key Questions: Any key changes needed? Is anything major missing?

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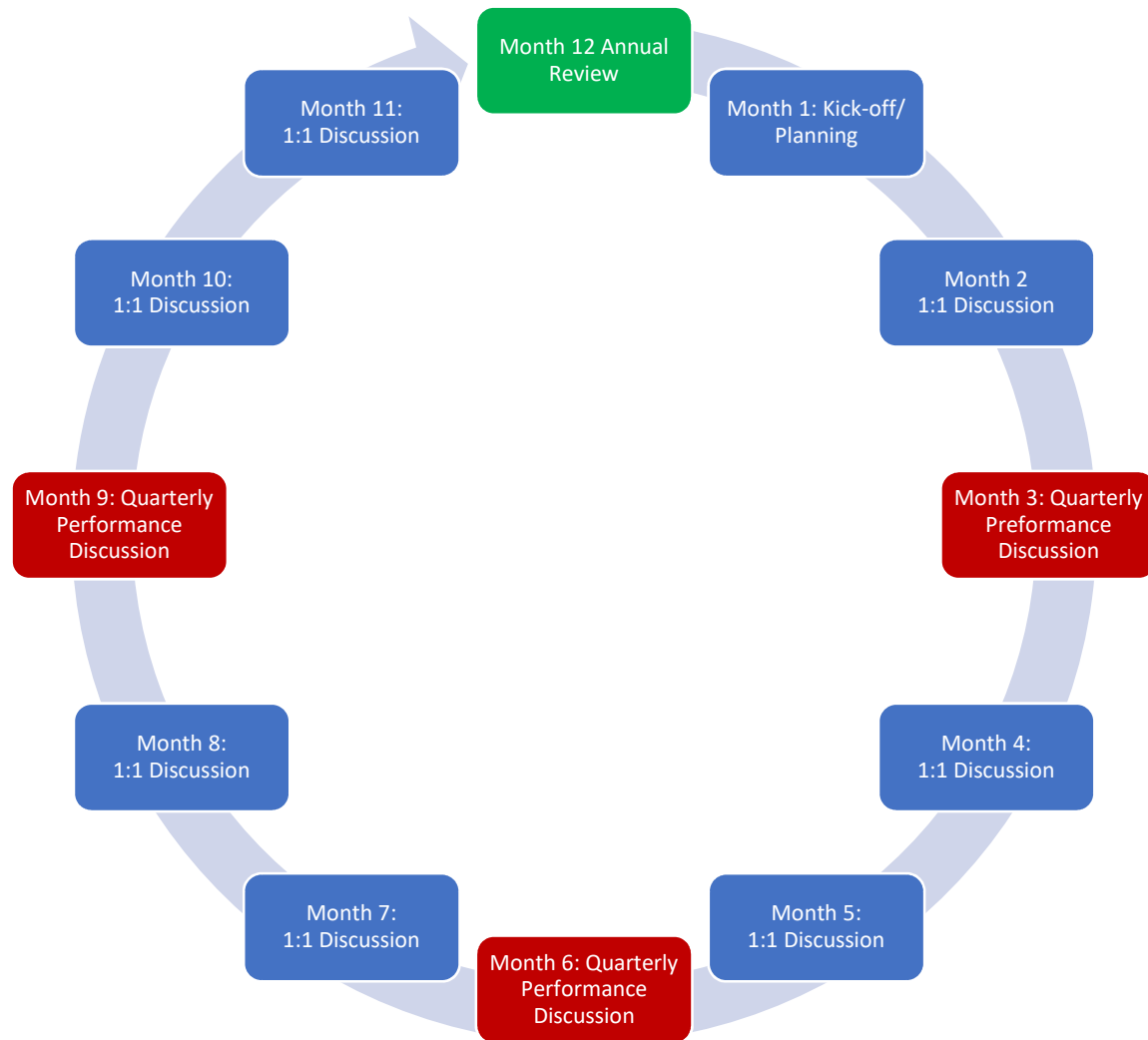# Performance Management Program Review and Recommendations

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Key Goals for the New Program

✓ More holistic view to help individuals move forward

✓ Aligns with core values and Library Unbound goals

✓ "Bigger picture," future focus; fosters accountability and development; applied consistently

✓ Incorporates goals

✓ More frequent and meaningful discussions, coaching

✓ Recognizes "above and beyond" performance

✓ User friendly and streamlined

✓ Encourages a positive view of performance discussions

✓ Fits all positions, not just public service roles; adaptable for different needs

✓ Other: Perceived as fair, promotes trust, communication, and transparency; includes training

Recommended Program Elements

- **Regular 1:1 meetings** with coaching and emphasis on individual job duties
- **Simple summaries of meetings,** initiated by staff
- **Core Competencies**
- **Goals**
- **Simplified ratings and summary scores**
- **Flexible framework** that managers and employees adapt to their needs

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1:1s – Monthly+

Month 12 Annual Review

Month 1: Kick-off/ Planning

Month 2 1:1 Discussion

Month 3: Quarterly Preformance Discussion

Month 4: 1:1 Discussion

Month 5: 1:1 Discussion

Month 6: Quarterly Performance Discussion

Month 7: 1:1 Discussion

Month 8: 1:1 Discussion

Month 9: Quarterly Performance Discussion

Month 10: 1:1 Discussion

Month 11: 1:1 Discussion

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1:1s – Monthly+
30 minute meetings

Components

- 1:1 discussions focus primarily on work progress and development

- Performance against goals/ competencies is discussed at least once/quarter

- Probationary reviews for new hires occur during a 1:1 meeting scheduled before 90 days

- Incorporates a formal, but streamlined annual review

Analysis

- More manageable than required weekly meetings but flexible for those who want more contact

- Increases opportunity to manage day-to-day work performance and cooperate on problem-solving

- Allows for customization based on job duties and project responsibilities

- Increased awareness of team's work, issues, and concerns

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Documentation – 1:1 Summary
Sample – Form to be developed

Monthly 1:1 – Summary

Employee: Add bullet points here to summarize one Monthly 1:1 you had with your supervisor. (Summarize one each month; always summarize the quarterly discussion that focuses specifically on performance and goals.) Include any updates to goals and any action items. Relate activity to goals of Library Unbound and Library values, where possible.

Date of discussion:

Today's date:

Summary:
- [update]
- [update]

Updates to goals (if any):
- [update]
- [update]

Action items (if any):
- [update]
- [update]

Supervisor comments:

- **Employee summarizes monthly discussion and updates goals and action items**
- **Manager reviews/ comments**

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Documentation – Annual Review
Sample – Form to be developed

Annual Review – Year One

Annual Performance Development Discussion – Summary

Supervisor: Use information from the weekly/monthly/quarterly 1:1 updates to complete this review.

Date of discussion:

Today's date:

Summary - Competencies:
- Competency 1 – definition
- Comments/examples
- Rating Exceeds, Meets, Does Not Meet

- Competency 2 – definition
- Comments/examples
- Rating: Exceeds, Meets, Does Not Meet

- Competency 3 - definition
- Comments/examples
- Rating: Exceeds, Meets, Does Not Meet

- Competency 4 - definition
- Comments/examples
- Rating: Exceeds, Meets, Does Not Meet

- Competency 5 - definition
- Comments/examples
- Rating: Exceeds, Meets, Does Not Meet

Summary - Goals:
- Progress with respect to goals
- Describe evolution of goals during the year

Summary – Development Activities:
- Update
- Update

Overall Summary
- Supervisor's comments
- Rating: Exceeds, Meets, Does Not Meet

Employee's comments:

Signatures (digital?)

- **Streamlined but formal annual review with ratings for individual components and an overall summary and rating**
- **Will use a rating scale of Meets, Exceeds, or Does Not Meet Expectations – eliminate numeric ratings**
- **Will include a self-evaluation/ reflection prep tool for staff**

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Key Questions

- What do you think of the program?
  - What do you like about it?
  - Do you have any concerns?
- Does the frequency of "monthly+" 1:1s seem effective to you? Is it manageable?
- How do you feel about being responsible for summarizing 1:1 conversations with your manager?
- Of all the program elements, what's the most important to you?
- If you could make one change to improve the program, what would you do?
- What obstacles might prevent an improved PM program from sticking/working well?
- Performance management vs. performance development?

Support Tools to Be Developed

- **Process guide**

- **FAQ**

- **Prep guide** for discussions

- **Guiding questions and guidelines** for successful 1:1 discussions

- **Quick reference card** to include competencies, definitions, and behavioral indicators

- **Goal worksheet** for development of SMART goals

Key Questions
- Are there additional support tools you'd like to see?
- Is anything major missing?

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Other Program Information

- Training
  - Six-hour interactive training for managers, including role play and practice activities
  - Two-hour in-person sessions for staff
  - One-hour webinar (make up session)
  - Follow-up modules to be used in manager meetings to develop and reinforce new skills

- PM systems under research

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Upcoming Next Steps

- **Build behavioral indicators** to align with the core competencies

- **Develop forms and other materials** (guides, FAQ, quick reference cards, etc.)

- **Validate final design** and materials with PMC and leadership team

- **Post final design** to the project site

- **Send final draft materials to focus group participants** for review and testing (mid-late July)

- **Conduct second round of virtual focus group sessions** (late July/early August)

Questions? Comments?

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