**Performance Management Toolkit Proposal**

**Solution title:** Performance Management Toolkit

**Purpose:** To provide managers with direct reports with a business expectations and process and procedures tool kit that will help them to increase their effectiveness and efficiency as performance-based managers.

**Target audience:** Managers with direct reports

**Theoretical justification:** Symbolic Interactionism suggest that when individuals interact with an object (performance expectations, tools, and resources), their interpretation of that object will guide their decisions, behaviors, and actions (Littlejohn, 2002).

**Timing:** This toolkit should take approximately 2 weeks to implement once designed and developed (most of the tools are complete; they need to be revised and repurposed). Total time to complete (design, development and implementation) = 12 weeks (the 2012 items below will take approximately 2 weeks to design, develop, and pilot).

**Requirements:** The requirements for this toolkit consist of the following:

* Toolkit posted on the eLU
* Managers and senior leaders are made aware of the strategic business need this toolkit supports
* Affirm strategic business need with key stakeholders
* Process map posted with toolkit
* Pilot in November to solicit user feedback and make revisions

**Design description:** The Performance Management Toolkit will allow users to view a series of job aids that focus on their ability to complete critical functions of performance management, from coaching and providing feedback (includes documentation standards/requirements) to successfully completing PIPs & CAFs, and Quarterly, Mid-year, and Annual reviews. There will also be an FAQ document accompanied with a process map so that users can easily find out key functionalities of the toolkit. There will be a series of webinars to provide ongoing guidance and direction, answer questions, and collaborate with managers on what success looks like (includes collaborating review ratings). Additionally, there will be a manager development curriculum with three learning paths, plus new manager onboarding (focuses on Strayer specific core processes – not skill development). These learning paths will focus on developing skills based upon new, intermediate, and experienced manager proficiencies. Users will be able to access this toolkit from the eLU Leaders tab.

The critical elements of this intervention include (this will be an incremental phased approach):

1. **Job aids:**

Short term (November-December 2012) - a 2-3 page job aid that will provide expectations for giving feedback, constructive criticism, examples of each, and reinforcement for the rater scale (what it means to get a 1-5).

Long term - a series of job aids (no more than 2-3) that sets expectations, provides a timeline, and illustrates various examples. The focus will be on giving feedback, coaching to performance, performance evaluations (how frequently, how to do them successfully, etc.), performance management process flow, performance management expectations for managers.

1. **Webinars:** a series of webinars to provide calibration assistance, answer questions, and provide guidance.

There will be a webinar in December, 2012, focusing on the Annual Review process, rating, and Q&A for managers.

There will be three phases for 2013 that will focus on the following:

* 1. Phase 1 – Setting goals and objectives for your team, accountability, coaching and feedback, and quarterly review benefits.
  2. Phase 2 – Midyear review of goals and objectives, apply feedback tips, and Q&A.
  3. Phase 3 – Prep and refresher for 2013 Annual Performance Reviews.

1. **Revise and repurpose Management Foundations**: This entails eliminating text heavy components and replaces them with either job aids or quick hit performance based eLearning modules (10-15 minutes in length). There will be learning activities that are succinctly aligned to performance objectives based upon business needs for manager development. The existing need is to ensure improved performance in the following areas of performance management:
   1. completing PIPs/CAFs correctly
   2. providing frequent feedback (includes quarterly evaluations)
   3. having crucial conversations (includes the how to word certain uncomfortable or awkward feedback such as dealing with hygiene)
   4. completing a successful Annual Performance Review
   5. setting expectations for managers on performance management.
2. **Learning paths**: This entails establishing learning paths for new, intermediate, and advanced manger proficiency in core leadership skills. Additionally, there will be ongoing opportunities for continuous self-development for managers and leaders.
3. **Sustainability:** Sustained by HCM team members. We’ll provide process flow job aid to senior leaders along with a link to eLU leaders tab (this stuff will be housed there). We’ll send a quarterly push and pull message regarding a component of performance management to all managers with direct reports to get them accessing the eLU.
4. **Identify major process steps within the performance management framework:** The process is not currently mapped out. It will take some time to meet with the correct stakeholders to complete this task.
5. **Identify major tasks within each major process step:** Step-by-step instructions will need to be developed to walk users through successful completion of these tasks. This is a critical part in the design phase of the implementation as it will provide users with the “how” of major performance management tasks.
6. **Discuss and revise** (formative evaluation): The group will need to come to a general consensus prior to implementation for content, layout and design, and process map components.
7. **Document finished product:** Need to ensure the finished product is on the appropriate branding documents.
8. **Evaluate** (summative): The toolkit will need to be evaluated for effectiveness, usability, and sustainability. This will be continuous.

Reference

Littlejohn, S.W. (2002). Theories of Human Communication. Belmont, CA: Wadsworth/Thomson Learning.