Performance and Development Review Process

Project Overview and Goal Prep Session
December 2018
Online Performance Reviews

- New Process / New Software
- Pilot Approach – Non Represented Staff
  - Office of Management & Finance
    - Bureau of Human Resources
    - Bureau of Revenue & Financial Services
    - Office of the Chief Administrative Officer
  - Portland Fire & Rescue
  - Portland Bureau of Transportation
- Project Implementation team – BHR, BTS, EBS, AspireHR and SAP
- System Go Live - February 2019
High Level Project Overview
360 Surveys and Calibration – Project Phase 2
Process Design Elements

- Clear Goals and Expectations
- Actionable Feedback
- Equitable Awards
The major changes involved in this new process will include:

**A Calendar Year Performance Cycle** - which is critical for aligned goal setting, fair ratings, and consistent merit increases.

**Quarterly Check-in Conversations** - that will allow for quick, ongoing feedback sessions instead of the dreaded yearend review.

**360 and Manager Feedback Surveys** - to ensure a fuller picture of an individual’s performance and impact in their bureau.

**Standardized Rating Scales** - to allow for consistent reporting and analysis Citywide.
4 Phase Cycle

Assess
January
April

Refine

Align

Grow
October
July
High Level Performance Cycle Overview

1. **Assess**
   - January 1st – March 31st
     - Set Objectives for the New Year
     - Conduct Annual Review
     - Deliver Ratings and Merit For the prior year
   - Employee and Manager Create Service and People Objectives
   - Manager Approves Objectives
   - Employee Acknowledgement
   - Manager Acknowledgement

2. **Refine**
   - April 1st – June 30th
     - Conduct Refine Check-In
   - Manager Confirms Refine Check-In
     - Adds Comments

3. **Grow**
   - July 1st – September 30th
     - 360 Feedback
     - Manager Feedback
     - Conduct Grow Check-In
   - Manager Confirms Grow Check-In
     - Adds Comments

4. **Align**
   - October 1st – December 31st
     - Conduct Align Check-In
     - Self Assessment
     - Manager Assessment
     - Calibration Meetings
   - Manager Confirms Align Check-In
     - Employee Rates Self Assessment
     - Manager Rates Self Assessment
     - HRBP Conducts Calibration
Objective setting is the first and most important step in our process, as good objectives facilitate the rest of the Performance and Development Review cycle.

Objective setting is the process of translating City, bureau and workgroup objectives into individual contributions. From an employee’s perspective, it’s a way to see how your work contributes to and aligns with overall bureau and team goals.

Minimum of 3 Objectives in each category Service and People.
2 Types of Objectives

Service Objectives
“What we do.”

People Objectives
“How we do it.”
Service Objectives should include objectives that are aligned with key job accountabilities, bureau priorities, functional project work, and efficient and effective delivery of quality services. These are our, “what we do” objectives.

Examples of a service objective include:
• On time completion of a key project.
• Decrease in the response time of a core service.
• Implementation of a new technology.
• Execution of a key bureau initiative.
People Objectives should include objectives that are aligned with supporting employees, citizens, and other customers; creating an inclusive and supportive environment, personal development and learning, improvement on prior feedback, as well as being a great people leader for those in supervisory roles. These are our, “how we do it” objectives.

Examples of a people objective include:
• Provide supportive and helpful customer service.
• Improve understanding of project management by attending online course.
• Taking action to improve upon prior year’s 360-degree feedback
• Demonstration of core value of your bureau
4 Key Events – 4 Check-Ins

4x4 Quarterly Check-In:

• How did you do against your **service objectives** during the last quarter?

• How did you do against your **people objectives** during the last quarter?

• What are your **priorities for the next quarter**?

• What **training, resources, or coaching** do you need to meet those priorities?
Align

**Calibrated and Consistent Ratings**

<table>
<thead>
<tr>
<th>Service Rating</th>
<th>Exceeded Expectations</th>
<th>Met Expectations</th>
<th>Did Not Meet Expectations</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>People Rating</th>
<th>Exceeded Expectations</th>
<th>Met Expectations</th>
<th>Did Not Meet Expectations</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>

**Combined Average of Service and People Objectives Rating**

<table>
<thead>
<tr>
<th>Overall Rating</th>
<th>Superior</th>
<th>Commendable</th>
<th>Effective</th>
<th>Needs Improvement</th>
<th>Unsatisfactory</th>
<th>Too New to Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Numeric Scale</td>
<td>6</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>Combined Scoring</td>
<td>(5.5 – 6.0)</td>
<td>(4.5 – 5.4)</td>
<td>(3.5 – 4.4)</td>
<td>(2.5 – 3.4)</td>
<td>(2.0 – 2.4)</td>
<td>N/A</td>
</tr>
</tbody>
</table>
Pam, you need to learn how to be nicer to people. I'm not sure how you get there, but do it.

Ronald T Zito has not signed yet

Create a system for communicating and tracking competitive intelligence by (date) - I am not a robot!

1.0 - Needs Improvement

3.0 - Exceptional

Unable to Rate
Next Steps:

Wrap Up

- Wrap Up Existing Anniversary Based Performance Reviews
  - No Later Than February 1st 2019

Start

- Start Defining Service and People Objectives for 2019
  - Input into the new System upon Go-Live February 4th 2019
  - All Objectives Entered by March 31st 2019

Stay

If you have additional questions please feel free to contact your Bureau’s Representative:

Portland Fire & Rescue – Keith Hathorne, Mark Whitaker, Robyn Burek

Bureau of Human Resources – Ron Zito, Pamela Davis

Portland Bureau of Transportation – Stephanie Reynolds, Ken Lee, Courtney Duke

Bureau of Revenue & Financial Services – Anita Lane, Michelle Kirby

Office of the Chief Administrative Officer – Anita Lane, Aaron Rivera