



# Talent Management

Who's driving your career?

CAREER R.O.A.D.

REFLECTIONS

OPPORTUNITIES & GOALS

ACCOMPLISHMENTS

DEVELOPMENT

	<b>Topic</b>	<b>Presenter(s)</b>
1	Introduction	Human Resources
2	It's YOUR Career-Time to Take the Wheel	Public Service University
2	Talent Management – Driving to Success	
	Profile Management	
	Performance Management	
3	S.M.A.R.T. Performance Goals	
4	Career Goals	
5	Starting the Journey	
	Training Support	
	Contact List	
	Quiz Instructions	

# Introduction

- ▶ Administrative Instruction 7-32-1
  - Employee Work Plan (EWP)
- ▶ Administrative Instruction 7-32-2
  - Performance Evaluation Guide (PEG)
- ▶ Effective February 2006
  - Mandatory, but compliance was difficult
  - Process cumbersome
- ▶ Definition of Manager
  - Anyone that has a direct report and will be doing a performance review

## **Talent Management replaces EWP's and PEG's**

- No more paper performance evaluations. Completed online in PeopleSoft.

**Identifies employee contributions to achieving goals**

**Supports two-way communication: Manager and Employee**

**Increases Employee Involvement: Input on career goals and self-review**

**Staggered Performance Evaluation Due Dates**

- Driven by Employee Anniversary Dates (not Fiscal Year start/end)

# **What's New?**

**Five Point Rating Scale**

**2 Levels of Manager Approval**

**Manager Dashboard**

**Checkpoints**

**Compliance tracking by HR**

**Expectation: 100% Participation**



**It's YOUR Career – Time to Take the Wheel**





Beep, Beep!





How you looked on the outside



How you felt on the inside

When you weren't driving



When you were driving

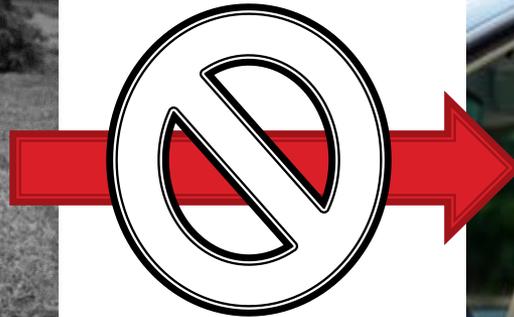


# Getting from Point A to Point B

Point A: Can't Drive



Point B: Licensed Driver



Driver's Ed Class

Permit

Practice Driving

Studying

Driving Test

# Is driving your car as fun as it used to be?

Probably not, but it's still just as important to keep control of the vehicle as it was the very first day.

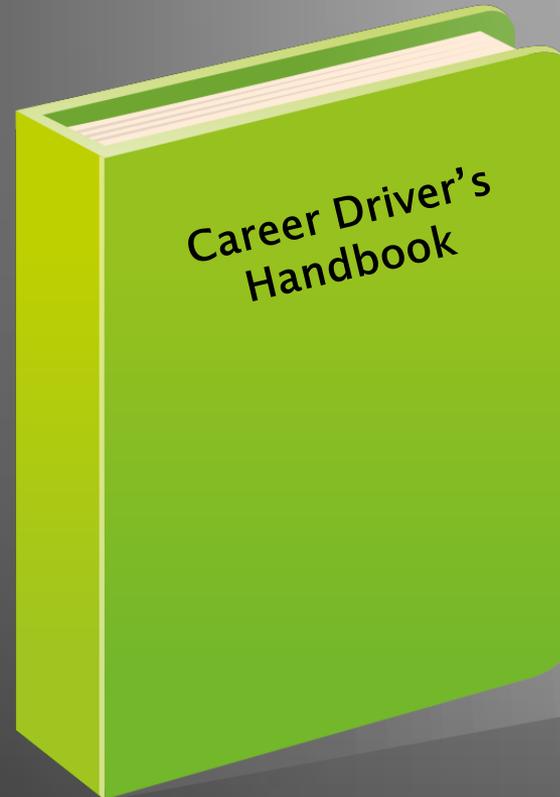
## **You are the driver.**

You decide where to go and how to get there.

The car is the tool you use to achieve your goal.



# Talent Management



▶ *Driving to Success*

# What is Talent Management?

There are two parts to Talent Management  
Profile Management + Performance Management

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## Part One: Profile Management

- Person Profiles track military service, training, education, as well as, licensing and certifications of any type (personal or professional).
- Help supervisors track certification expirations and employee KSA's (Knowledge, Skills and Abilities).



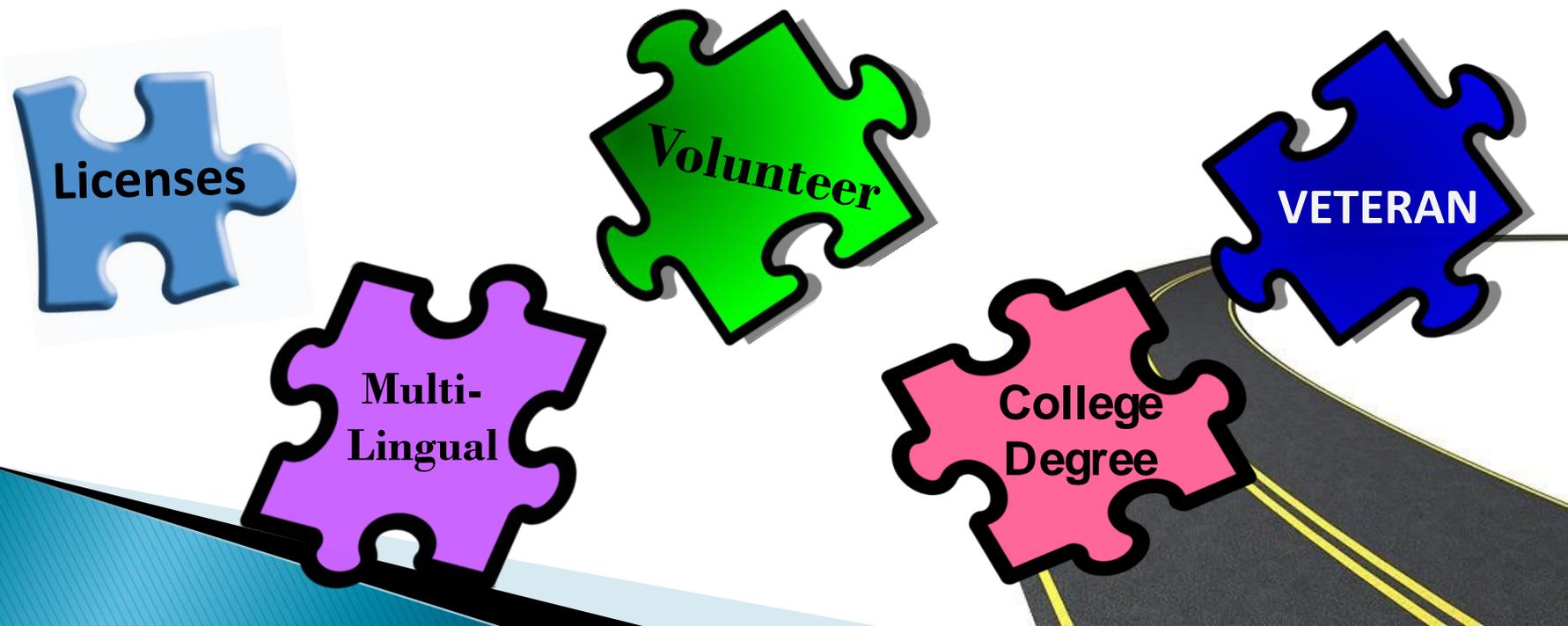
# Driving Your Career

Person Profiles are created by YOU.

Person Profiles are about YOU.

Person Profiles **SHOWCASE YOU!**

There is more to YOU than a Job Description!



# Create Your Person Profile

## ▶ My Current Profile

1. **Work Related Items**
  - a. Licenses and Certifications – Requires manager approval
  - b. Tests and Exams – Requires manager approval
2. **Education and Experience**
  - a. Degrees – Requires manager approval
  - b. Work Experience
3. **Personal**
  - a. Languages
  - b. Memberships
  - c. Honors and Awards
  - d. Military Service – Requires manager approval
4. **Other**
  - a. Volunteer activities
  - b. Additional roles

***Several items require manager approval.***  
Upload supporting documentation to prove the validity  
with your submission for these items.

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# Person Profile Responsibility

## Create your Person Profile

- Enter all work related licenses and certifications with their expiration dates
- The system will alert you and the manager when the expiration date is approaching so that they do not expire
- This eliminates manual tracking efforts and employee downtime



# Part Two: Performance Management

Performance Management is an ongoing, year round **ACTIVE** system.

PeopleSoft is the tool that facilitates the communication process with these important aspects:

- Communicating the business direction
- Planning performance
- Managing performance
- Evaluating performance
- Career Development
- Shared Accountability
- Two-way Communication



# Performance Management Timeline



# Performance Management Roles

## MANAGER ACTIVITIES

### Evaluating Manager

- Creates Document
- Adds City Goal(s) – Not Rated
- Reviews Core Values with Employee at beginning of year
  - Rates & Comments at end of year
- Sets & Reviews Performance Goals with Employee at beginning of year
  - Rates & Comments at end of year
- Sets Career Goals with Employee
  - Documents & Comments
  - Conducts Checkpoints
- End of Year Review & Shares with Employee
- Feedback from Employee
- Finalizes Performance Document

### Approving Manager

- Compliance Gatekeeper
- Review and approves/closes evaluation

## EMPLOYEE ACTIVITIES

- Reviews City Goals (Not Rated)
- Reviews Core Values (Rated)
- Reviews & Discusses Performance Goals with Manager (Rated)
- Sets Career Goals with Manager
- Participates in Checkpoints with Manager throughout year
- End of Year: Conduct Self-Review, Ratings & Adds Comments
- Receives Manager Review
- Provides Feedback/Comments
- Acknowledges Final Review/Rating



## Progress is tracked by the system:

1. Leads the manager through the steps.
2. Shows due dates for each of the steps.
  - Due dates trigger alerts.
3. Sub-steps also display.
4. Steps in progress display as yellow.
5. As each step is completed, a green checkbox appears.
6. If the step is late, the icon will show red.
7. If a checkpoint is skipped, the step shows as skipped.

**Green = Completed**  
**Yellow = In Progress**  
**Red = Overdue**

Performance Process

Steps and Tasks

07/01/2015 - 06/30/2016 [Overview](#)

- ▶  Define Criteria  
Due Date 10/04/2015
- ▶  Checkpoint 1  
Due Date 10/04/2015
- ▶  Checkpoint 2  
Due Date 01/02/2016
- ▶  Checkpoint 3  
Due Date 04/01/2016
- ▶  Finalize Criteria  
Due Date 04/01/2016  
Update and Complete
- ▶  Review Self Evaluation  
Due Date 07/25/2016  
View

Performance Process

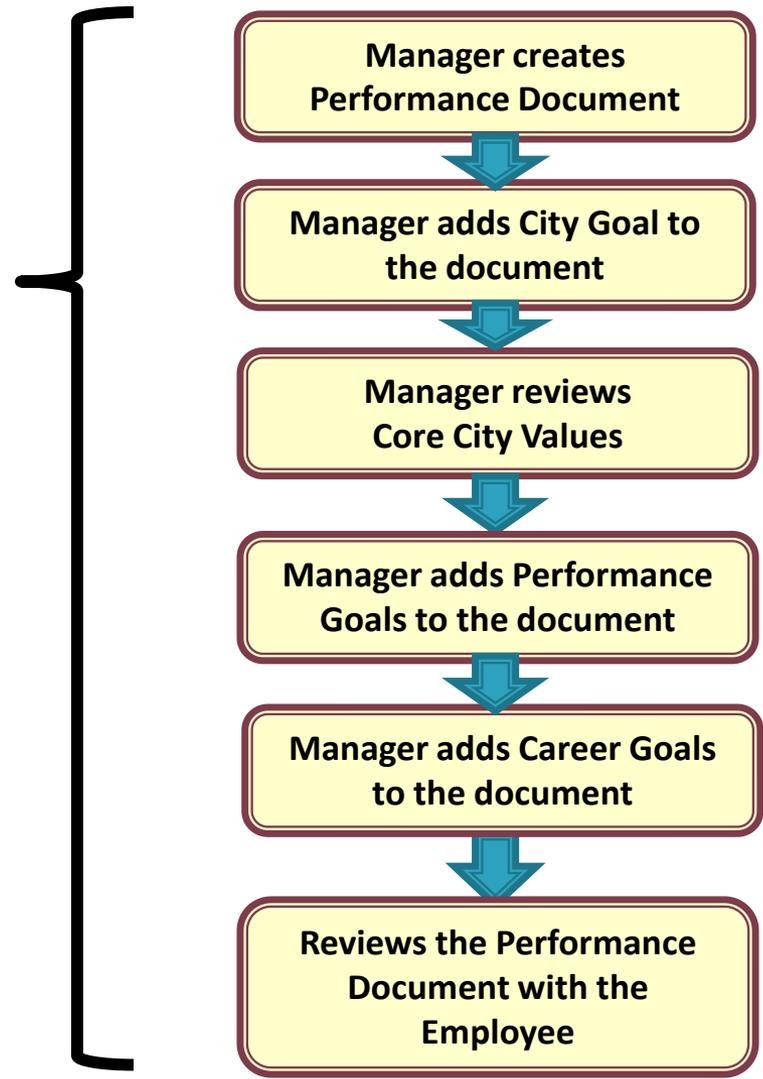
Steps and Tasks

Albert Albuquerque  
Basic Annual Review  
07/18/2016 - 07/17/2017 [Overview](#)

- ▶  Define Criteria  
Due Date 08/16/2016
- ▶  Checkpoint 1  
Due Date 11/19/2016
- ▶  Checkpoint 2  
Due Date 03/19/2017
- ▶  Finalize Criteria  
Due Date 07/12/2017
- ▶  Review Self Evaluation  
Due Date 07/22/2017
- ▶  **Complete Manager Evaluation**  
Due Date 07/27/2017
  - Update and Share
  - Request Acknowledgement
  - Pending Acknowledgement
  - Submit for Approval
  - Pending Approval

Complete

## Beginning Process



Performance Process

Steps and Tasks

Albert Albuquerque  
Basic Annual Review  
07/18/2016 - 07/17/2017 [Overview](#)

- ▶  Define Criteria  
Due Date 08/16/2016
- ▶  **Checkpoint 1**  
Due Date 11/19/2016
- ▶  **Checkpoint 2**  
Due Date 03/19/2017
- ▶  Finalize Criteria  
Due Date 07/12/2017
- ▶  Review Self Evaluation  
Due Date 07/22/2017
- ▶  **Complete Manager Evaluation**  
Due Date 07/27/2017
  - Update and Share
  - Request Acknowledgement
  - Pending Acknowledgement
  - Submit for Approval
  - Pending Approval

Complete

## During the Year

Manager & Employee:  
Add Performance Notes  
(Ongoing)

Checkpoint 1: Manager  
Comments & Shares

Employee reviews comments  
and adds comments

Checkpoint 1: Complete

Checkpoint 2: Manager  
Comments & Shares

Employee reviews comments  
and adds comments

Checkpoint 2: Complete

Performance Process

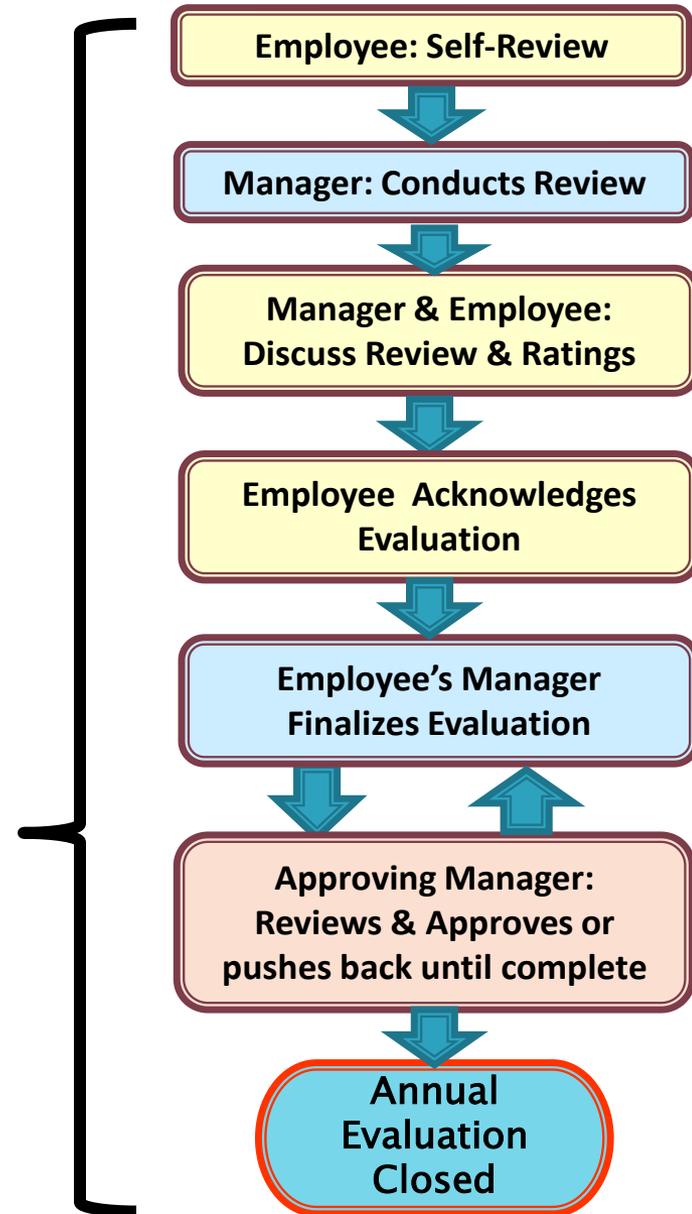
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- ▶  Finalize Criteria  
Due Date 07/12/2017
- ▶  Review Self Evaluation  
Due Date 07/22/2017
- ▶  Complete Manager Evaluation  
Due Date 07/27/2017
  - Update and Share
  - Request Acknowledgement
  - Pending Acknowledgement
  - Submit for Approval
  - Pending Approval

Complete

# End of Year



# Performance Document

## Tabs:

1. City Goals
2. Core Values
3. Job Summary
4. Performance Goals
5. My Career Goals
6. Overall Summary
7. Comments

Attachments can be added to the document by the Evaluating Manager Only.

Audit History on the bottom of every document.

Basic Annual Review  
Manager Evaluation - Pending Approval  
Albert Albuquerque

Actions ▾

Job Title	Human Resources Mgr	Manager	Sandy Socorro
Document Type	Basic Annual Review	Period	07/18/2016 - 07/17/2017
Template	City-Wide Annual Review	Document ID	744
Status	Approval - Submitted	Due Date	07/27/2017

Employee Data

Empl ID	000031002	
Department	4713000	HR-Employment
Location	10000	City Hall
Years of Service	4 Years	3 Months
Years in Job	2 Years	7 Months

Rating History

Long Format | View Graphical Rating

City Goals | Core Values | Job Summary | Performance Goals | My Career Goals | Overall Summary | Comments | Other Items Not Rate

Section 1 - City Goals

Expand | Collapse

City Goal 8: GOVERNMENTAL EXCELLENCE AND EFFECTIVENES

Description : Government is ethical, transparent, and responsive to its citizens. Every element of government contributes effectively to meeting public needs.

Created By Sandy Socorro 07/19/2016 2:58PM

Attachments

No Attachments have been added to this document

Audit History

Created By	Sandy Socorro	07/19/2016 1:39:35PM
Acknowledged By	Albert Albuquerque	07/20/2016 2:45:45PM
Manager Signed By	Sandy Socorro	07/20/2016 2:54:23PM
Last Modified By	Sandy Socorro	07/20/2016 2:54:23PM

# New Rating Scale

## ▶ **5 Point Rating Scale**

1. Unsatisfactory Performance
2. Needs Development
3. Meets Expectations
4. Exceeds Expectations
5. Exceptional Performance

## ▶ **There are two Rated Sections:**

- Core City Values
- Performance Goals

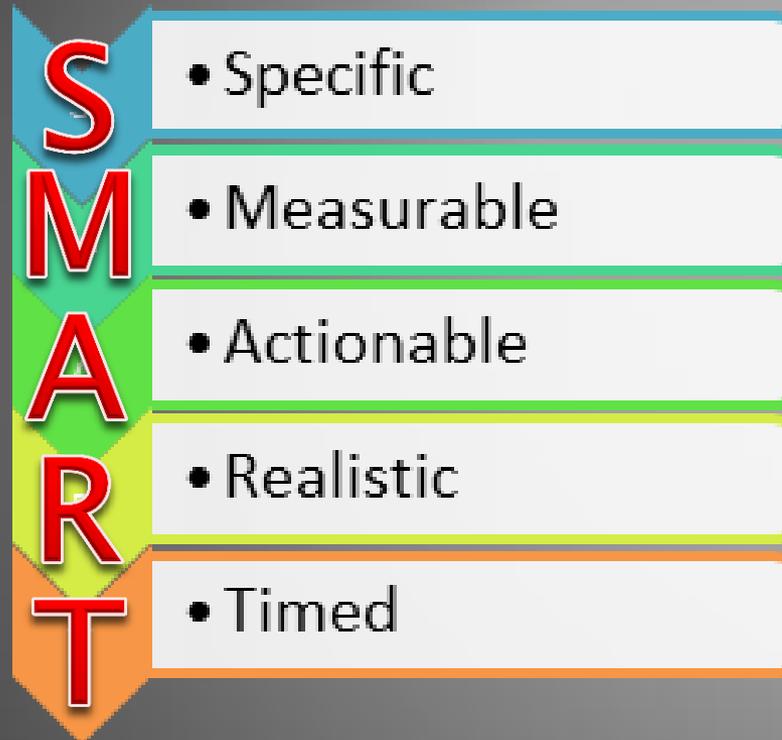
# View of the 5 Point Rating Scale

Proficiencies		
Rating	Numeric Rating	Description
1 - Unsatisfactory	1.00	Performance in one or more dimensions is substantially weak. Performance goals and objectives are not met even with supervisory direction or after a performance improvement plan.
2 - Needs Improvement	2.00	Performance in one or more aspects of this dimension is less than expected and needs improvement. Direction, supervision, and training are required if performance goals and objectives are to be achieved.
3 - Competent	3.00	Performance consistently meets job requirements. Achieves performance goals and objectives as stated.
4 - Exemplary	4.00	Performance is consistently above adequate skill levels. Achieves performance goals and objectives often beyond expectations.
5 - Superior	5.00	Performance is consistently and significantly above established standards. Achieves performance goals and objectives at fully outstanding level and demonstrates exceptional skill levels.

[Return](#)

# Additional Performance Tools

- Ability to Add Performance Notes all year
  - Advantages:
    - Performance Notes are Private
    - Jogs your memory about highlights/successes
    - Quick access to copy and paste to your Performance Document
    - Helps you support your self-review ratings
    - Assists in evaluation discussion with manager
- Workflow E-mails
  - System generated e-mail reminders/updates
  - Directs manager and employee to the next steps in process
  - Provides a URL link to take you to the Performance Document



## SMART Performance Goals



# **What is a SMART Performance Goal?**

- A carefully crafted, comprehensive statement about what the employee intends to accomplish throughout the year
- An individual action plan

## **Advantages of SMART Performance Goals**

- Provides guidance and direction for work
  - Links employee accomplishments to organizational objectives/goals
  - Clarifies expectations for the employee and supervisor
  - Improves performance
- 

# Elements of SMART Performance Goal

	Definition	Answers the question	How to do it
Specific	Objective, concrete, detailed	What specific outcome do I want to achieve?	<i>Use descriptive words Provide as much detail as possible</i>
Measurable	Quantitative, results-focused, numeric	How will I measure the effectiveness of what I do?	<i>Current state vs. future state Use numbers, percentages, ratios, etc. (not dates) Identify the item to be measured Set a specific (numerical/empirical) outcome Set a frequency for measurement</i>
Actionable	What you will do	What specific steps/actions will I take to achieve the goal	<i>Use action verbs Provide as much detail as possible</i>
Realistic	Explicitly links to City direction	Do my actions contribute to or support City objectives?	<i>Make sure that the target is "doable" Reasonable expectations for you to achieve your plans but challenges you</i>
Timely	Timeframe or dates for completion	When will I get it done?	<i>Use the month, day, and year Identify a specific time you will complete your target</i>

**Example:**  
Reduce time from answering call to first responder call-out by 10% by 6/30/2017 in order to support Public Safety.

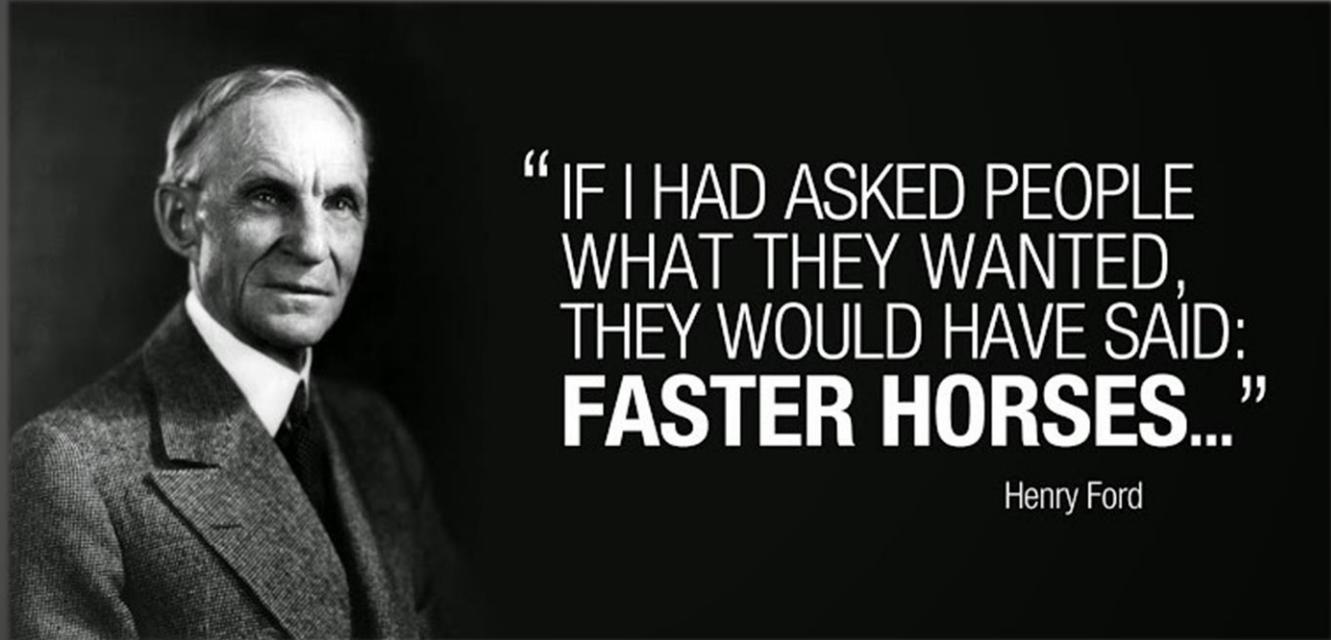
# Manager: Providing Direction

- Sets the Performance Goals and adds them to the Performance Document
- Communicates the goals and responsibilities to employee
- Makes sure that the employee understands the goals
  - Answers employee questions to clarify.
- The manager is responsible to create the goals, but employee is responsible for their performance.
- Comments on progress at Checkpoints
- Rates and Comments at end of performance year

# Employee: Taking the Wheel

- Reviews the Performance Goals set by the manager
- Understands goals and their associated responsibilities
- Asks questions until the goal is clear
- Responsible for performance related to meeting the Performance Goals
- Comments on progress at Checkpoints
- Conducts Self-Review at end of performance year

Managers may work with employees to create the goals, but managers have the final responsibility to set the Performance Goals.



Career Goals



**Where do you want to be in 1 year? 5 years? 10?**  
**Career Goals help you get there!**

### **Advantages of Career Goals**

- Assists in achieving the Performance Goals
- Enhances your Knowledge, Skills and Abilities
- Uniquely YOURS! Tailored to help you meet your personal career goals.
- Helps you keep your current career on track
- Helps prepare you for your career future



**SUCCESS**

# Questions to help create a Career Goal

- ❑ Development Target  
*What do I need to improve?*
- ❑ How to Achieve  
*What Development Method(s) will I use?*
- ❑ Measurement  
*How will I measure my improvement?*
- ❑ Completion Date  
*When will I complete my Development Target?*
- ❑ Results  
*What was the impact on my performance?*

Managers will work with employees to create meaningful Career Goals, but managers have the final responsibility to enter them into the system.



# Career Development Opportunities

- Advisory Committees
- Apprenticeships
- Certifications
- Challenging/Stretch Work Assignments
- Classroom Training
- Conferences
- Cross Training
- Degree Programs
- Internships
- Job Rotation
- Job Shadowing
- Job Swap
- Mentoring
- Online Learning
- On the Job Training (OJT)
- Professional Association Activities
- Reading (Book Club)
- Research Projects
- Self Study
- Skill Development
- Special Projects
- Task Groups
- Volunteer Activities



# Career Goals

- Every employee should have a minimum of two Career Goals
  - Every employee should have a career goal to complete their Person Profile
  - Career Goals are NOT RATED, but they are Documented (Met or Not Met)
  - They are not part of the performance rating
- 

# Starting the Journey

# Training Support for Talent Management

## Public Service University -

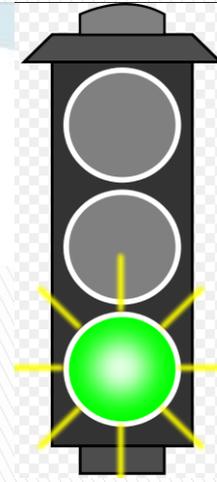
- Talent Management Website
- Classroom sessions: SMART Targets, etc.
- On-Demand Online Courses – Activity Based
  - Courses in **See It!** and **Try It!** mode
  - System Process Documents (Detailed Job Aids)
  - Job Aids (Quick Steps)
- Open Workshops

# Contacts

- Department Subject Matter Experts (identified by Directors)
- Department HR Coordinators
- Public Service University, 768-3200
- DTI Help Desk, 768-2930
  - Password resets & system issues



## Talent Management Quiz



There are two parts to complete before you will receive course credit:

- Part One: Complete training session
  1. Attended the training session ✓
- Part Two:
  2. Complete Quiz (final step)

You will receive an e-mail with the link to the Quiz.  
Complete the Quiz to receive credit.

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