

# Performance Management Guide

## ABOUT THIS GUIDE

This **Performance Management Guide** provides the necessary tools to assist leaders in conducting comprehensive and effective performance meetings with their employees. Additional resources are also available to guide the continuous feedback and coaching processes.

Nursing Practice employees, for your tools go to:

<http://sites.mc.rochester.edu/departments/nursing/working-here/performance-evaluations/>

## TABLE OF CONTENTS FOR THE GUIDE

### COMPREHENSIVE AND EFFECTIVE PERFORMANCE EVALUATIONS

- Organizational Principles of Performance Management

- Behavioral Competencies

  - Employee

  - Leadership

- Performance Management Process

  - Standard Review

  - Off-Cycle Reviews

- Feedback Process and Tools

- Self-Assessment Process and Tool

- Performance Management Tools

- Leadership Competencies

### CONTINUOUS FEEDBACK AND COACHING

- Using the Situation Behavior Impact (SBI) Feedback Technique

- Conducting Conversations with High, Middle and Low Performers

- Coaching for Success

- Career Development

## ORGANIZATIONAL PRINCIPLES OF PERFORMANCE MANAGEMENT

The principles below are the foundation for performance management. Every employee should incorporate the principles into their daily work. The principles are intended as guidelines during the performance management process and are defined as:

### **Integrity**

- Introduce yourself — greet, say your name, explain your role
- Be mindful of your actions — conversation topic, tone, volume, body language

### **Compassion**

- Communicate with warmth — use preferred names, smile, make eye contact, listen attentively
- Respond to feelings — show empathy and kindness

### **Accountability**

- Answer questions clearly — ask about and address concerns, explain next steps
- Involve and update — patients, families, and colleagues

### **Respect**

- Be courteous and friendly — to all patients, families, and colleagues throughout the institution
- Speak positively — about your colleagues and other departments within the organization

### **Excellence**

- Take the initiative to help — ask if there is anything else you can do; assist your colleagues
- Recognize your colleagues — thank them for their efforts

## THE BEHAVIORAL COMPETENCIES

### *Employee Competencies*

#### **Personal Accountability**

- Commitment to Quality – Takes pride in work, strives for excellence. Takes responsibility for performance and fixes mistakes. Continually looks to improve the quality/quantity of work.
- Safety Consciousness – Contributes to a safe working environment; performs duties in a clean and safe manner. Brings safety concerns to appropriate parties; takes initiative to resolve when possible.
- Attendance and Punctuality – Fulfills work and time requirements. Keeps unscheduled absences to a minimum. Plans for coverage of responsibilities where appropriate.
- Reliability/Dependability – Meets task deadlines and work commitments. Fulfills work obligations in a timely and satisfactory manner. Takes responsibility for personal actions and performance.
- Appearance – Dresses appropriately. Avoids wearing strong fragrances or other strong odors (e.g., from smoking). Keeps workplace neat, clean and organized.

#### **Professionalism**

- Self-Awareness – Demonstrates continuous professionalism, respect, and workplace civility. Mindful of actions: topic, tone, volume, and body language. Avoids gossip.
- Working with Others – Approachable, inclusive, and respectful. Exhibits teamwork, takes initiative to help. Courteous and cooperative. Respects diversity and appreciates differences.
- Relationship to Supervisor – Responds and acts cooperatively; works to maintain positive relationships with supervisor/manager. Accepts responsibility for own actions.
- Gives and Receives Feedback – Provides constructive feedback to colleagues. Mindful of both verbal and body language when giving feedback. Receptive to feedback from others; accepts feedback without defensiveness.
- Role Modeling – Conducts self in fair and trustworthy manner. Upholds professional and ethical standards. Demonstrates departmental and organizational values including Integrity, Compassion, Accountability, Respect, and Excellence.

#### **Functional Expertise**

- Job Knowledge – Clearly demonstrates functional expertise as it relates to the job.
- Strives for excellence. Asks relevant questions when uncertain. Shares information and knowledge with others.
- Learning Agility – Keeps abreast of new developments and enhancements to systems, procedures and products. Values learning; seeks out new learning and development opportunities. Completes learning assignments in a timely manner.

(See Service Excellence on following page)

## **Service Excellence**

- **Treatment Toward Others** – Listens carefully, expresses compassion and empathy where appropriate. Mindful of the perspective and needs of others, (e.g., colleagues, patients, students, families and others).
- **Service Orientation** – Embraces organization and department mission. Works to understand goals and objectives of the unit or the department.
- **Communication** – Communicates ideas and messages clearly and concisely. Actively listens, seeks to understand others. Answers questions clearly and asks clarifying questions when needed. Keeps others informed when deadlines are challenged.
- **Productivity** – Works to deliver an expected volume of work; seeks operating efficiencies without sacrificing quality. Works to stay organized. Uses technology as needed/where appropriate.
- **Responds to Change** – Adapts to changing priorities. Handles unexpected situations and does so in a calm and positive manner. Where appropriate, questions and recommends alternatives to new processes and procedures.

***Leadership Competencies*** (employees who manage direct reports, program management responsibilities, etc.) Also listed on page 11.

## **Effective Communication**

Writes and speaks clearly. Articulates ideas and instructions in a clear and concise manner. Encourages dialogue and candor; makes it safe for others to voice their opinion. Active listener; takes the time to consider alternative points of view. Keeps others informed; conveys important information in a timely and efficient manner.

## **Partnership & Team Building**

Values, respects and is open to others' point of view. Relates well to people at all levels of the organization. Actively works to build a team. Empowers employees to take action. Supports team decisions both publicly and privately. Manages conflict; builds common ground, focuses on the positive and seeks constructive outcomes. Demonstrates care and concern for all team members and those we serve.

## **Organizational Effectiveness**

Takes initiative to get things done. Actively sets priorities. Runs effective meetings; starts/stops on time, maintains focus on topic. Analyzes short-term and long-term risks; identifies pros and cons; evaluates options and chooses effective solutions. Makes critical decisions in a timely manner.

## **Performance Management**

Tracks, monitors, and documents employee performance. Actively encourages goal setting. Provides timely, effective, and constructive feedback. Holds team members accountable for their performance and results. Delegates tasks appropriately. Creates an environment where employees and others feel valued and appreciated. Routinely recognizes team members for their contributions formally and/or informally.

**Leading Change & Innovation**

Champions change and innovation. Readily adapts to change, makes adjustments when needed. Helps others overcome resistance to change. Stays calm in the face of great change. Actively encourages and supports new ideas. Leads process improvement, encourages efficiency, works to build value for the organization. Helps develop innovative solutions.

**Stakeholder Focus**

Maintains positive and collaborative connection to key stakeholders. Understands needs, goals and objectives of all constituent groups. Works to create, monitor, and exceed key metrics and targets in support of key groups.

**Strategic Thinking & Planning**

Ability to see the big picture by thinking conceptually, imaginatively, and systematically. Visionary and forward thinking; able to see long-term opportunities. Demonstrates the ability to develop effective plans in line with organizational goals. Actively sets priorities. Works to focus energy and resources toward common organizational objectives.

**Industry/Regulatory Compliance Knowledge**

Exhibits knowledge of, and ensures compliance with, federal and state regulatory requirements (for example: Affirmative Action, FLSA, and NY Wage and Hour Laws, HIPAA, Joint Commission, nondiscrimination laws, FERPA, etc.). Initiates appropriate follow-up when concerns are identified. Demonstrates increasing knowledge of the organization, industry and marketplace. Leverages industry knowledge and business acumen to make appropriate decisions. Keeps abreast of new developments with organizational systems, procedures, and policies.

## **PERFORMANCE MANAGEMENT PROCESS**

### **Three Stages to Be Used In Any Review Process**

(End of Probation, Off-Cycle, or Annual Review)

#### **STAGE I**

Begin reviewing information, comments, or observations obtained throughout the year.

- Solicit feedback from employee's customers/peers.
- Review the rating scale criteria for each position to ensure consistency and equity.

#### **STAGE II**

Review the employee's functional job description to ensure it is current and accurate; revise as necessary and give to employee.

- Schedule the formal performance assessment meeting, giving the employee a notice of at least two weeks.
- Ask the employee to complete a self-assessment.
- Meet with the employee to discuss contributions, competencies, goals, and growth opportunities.
- Agree on a plan of action.
- Finalize the performance evaluation document and give to the employee.

#### **STAGE III**

Meet with each employee to review his/her progress.

#### **As Applicable Throughout the Year**

Provide ongoing coaching and feedback.

Periodic Performance Assessments are an important step in the overall performance management process. A comprehensive performance assessment includes:

1. Reviewing the employee's functional job description (updating as necessary) as well as the specific competencies and performance standards for the position.
2. Collecting feedback from the employee's customers/peers.
3. Setting a date with the employee for the formal performance assessment meeting. (Allow at least 30 minutes.)
4. Asking the employee to complete a self-assessment which includes 3-5 goals for the coming year.
5. Drafting a formal assessment that includes measurable core competencies and standards for the position.
6. Holding the performance assessment meeting, documenting any changes or plans for further action.
7. Finalizing the formal assessment tool to include employee input and goals to be signed by the employee and supervisor.
8. Providing a copy of the assessment to the employee.

### **Off-Cycle Reviews**

In addition to the annual review, there are two instances when off-cycle performance reviews would be applicable.

The **Off-Cycle Performance Review** is identical to the annual review. This is used primarily for staff employees when a review is needed outside the annual review cycle and assumes the manager has set up performance goals for the employee.

The **Off-Cycle End of Probation Review** is a simplified process for recent hires or transfers. The assumption is that performance goals have not yet been created for the individual, but managers and employees should create performance goals and/or key responsibilities in anticipation of the next annual review cycle.

## FEEDBACK PROCESS AND TOOLS

Collecting feedback is an excellent method to determine how well the employee interacts with others as part of their daily work. To use this method:

- Ask the employee to select five or six individuals with whom they regularly interact. Select three or four from this list.
- Request feedback on that employee either informally via an e-mail, or for a more formal approach, a tool can be used.

There are three types of feedback:

- **Peer Feedback:** Co-workers can provide insight into the employee's daily work habits and customer interactions. (More than one peer must be used to ensure balanced feedback.)
- **Customer Feedback:** External or internal customers who are not direct reports or peers can be selected; however, ensure the customer has had multiple points of contact with the employee so that a comprehensive evaluation can be made.
- **Direct Report Feedback:** Also called Upward Feedback, a manager or supervisor can request feedback from his or her staff. It is important, however, that the feedback is sent to a third party so that it remains confidential and anonymous.



## ASKING FOR FEEDBACK

### Sample of an Informal E-mail to an Employee's Customer:

Dear (Selected Individual):

As part of (employee's name) annual performance review process, I ask him or her to provide names of some customers he or she has worked with during the past year. He or she has given me your name; I understand you worked together on the \_\_\_\_\_ during the last several months.

Would you please provide some feedback on your interactions with (employee name) on that project? I am particularly interested in his or her ability to \_\_\_\_\_. Your comments are confidential and will not be shared with him or her unless you feel it is appropriate to do so. Thank you for your time.

A more formalized approach can be used to gain feedback. The feedback request can contain a few examples of the type of qualities that can be rated. The tool can also be expanded to focus on job-specific competencies as well.

For example:

If phone skills are required as part of the job, statements could be included such as:

- Answers the phone within three rings
- Responds to phone messages within 8 hours
- Leaves clear and concise messages on others' phones

If face-to-face customer interactions are part of the job, statements could include:

- Greets customers warmly, using standard scripting
- Keeps customers informed of delays
- Ensures the customer understands next steps in our processes

## SELF-ASSESSMENT PROCESS and TOOL

An important part of an employee's performance management meeting is the self-assessment. This can be accomplished either informally, or formally by using a tool.

If an **informal method** is used, the employee can be asked to briefly outline:

- His/her level of success in demonstrating how standards were met and how competencies were applied when completing duties and responsibilities.
- Goals achieved during the past year.
- Goals that have not been reached and what obstacles are in the way of achieving them.
- Accomplishments that were beyond the goals.
- Goals for the upcoming year (three to five).
- What resources they need to do their job for the upcoming year.

If an official self-assessment tool is used, it should contain the elements listed above and can be further tailored to the person's specific job responsibilities.

Process for using a formal self-assessment tool:

1. Provide the tool to employee at least two weeks prior to the performance meeting.
  - MyPath online performance assessment:  
<http://mypath.rochester.edu>
  - River Campus forms:
    - Employee:**  
[http://www.rochester.edu/working/hr/performancegmt/perf\\_eval\\_form\\_emp.pdf](http://www.rochester.edu/working/hr/performancegmt/perf_eval_form_emp.pdf)
    - Leader:**  
[http://www.rochester.edu/working/hr/performancegmt/perf\\_eval\\_lead\\_form.pdf](http://www.rochester.edu/working/hr/performancegmt/perf_eval_lead_form.pdf)
2. Ask the employee to complete it, adding whatever information they feel needs to be discussed during the meeting.
3. Ask that the form be returned to the evaluator at least one week before the meeting.

## PERFORMANCE MANAGEMENT TOOLS

To conduct a comprehensive performance assessment, the supervisor needs to determine all of the components of the position that will be used to evaluate the employee. An up-to-date functional job description is crucial in this process.

### THE FUNCTIONAL JOB DESCRIPTION

An employee's [functional job description](#) contains the responsibilities, tasks, competencies, education, and experience required to perform a specific job. Functional descriptions are developed and maintained at the department level and typically contain:

- Specific purpose of the position
- Responsibilities/tasks listed with percents of time associated with each duty
- Reporting relationships
- Requirements of the position in terms of education, experience, and competencies
- Any preferred requirements (not required) such as specific competencies or advanced degrees

### COMPETENCIES and PERFORMANCE STANDARDS

Competencies are defined as the knowledge, skills, attributes, and behavioral traits required for individual and organizational success. Competencies relate directly to an individual's particular job family and involve demonstrating knowledge in a technical, professional, occupational, vocational, or process area.

Where applicable, population-specific competencies or patient safety competencies should be added as components of the performance review, based on the job description. Additionally, standards set by regulatory agencies (Joint Commission, OSHA, NYS) may need to be included as well, as applicable.

Each employee's assessment tool should be customized to their position.

## PERFORMANCE STANDARDS WORKSHEET

A performance standards worksheet can be used to define measurable and observable behaviors which demonstrate how well an employee performs their duties and responsibilities. To create a worksheet, three columns of information are needed:

- a. **Critical Job Responsibilities:** Use this column to define the five to seven most essential/critical job duties and responsibilities.
- b. **Specific, Observable Behaviors:** After defining the duties and responsibilities, list those behaviors that demonstrate successful completion of each responsibility. These behaviors should describe work processes or interactions with people.
- c. **Assessment Method(s):** Use this column to assess whether the standards are met. These may include:
  - Direct observation
  - Meetings with the employee
  - Feedback from others (co-workers or customers)
  - Audits
  - Employee's self-assessment
  - Review of credentials
  - Review of reports, charts, letters
  - Measurement of cost, time, quality, or quantity

Additionally, the underlying [Organizational Principles](#) should be kept in mind when creating the worksheet.

Contact your [HR Business Partner](#) at the Medical Center or on the River Campus if you need assistance in developing a performance standards worksheet.

**LEADERSHIP COMPETENCIES (also listed beginning on page 4)****Effective Communication**

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## SBI FEEDBACK FRAMEWORK

When providing constructive feedback to improve behavior, meet with the employee as soon as possible after an event has occurred:

- Find a private setting.
- Describe the situation, sticking to the facts.
- Describe the behavior observed in neutral terms.
- Explain the impact that behavior had on the event.

The SBI Framework is an acronym for ***Situation, Behavior and Impact***. Using the SBI Framework brings the message back to the facts, making it easier to find solutions, rather than letting emotions control the situation.

**S**ituation: Explain the problem that needs to be discussed.  
Be specific about the details.

**B**ehavior: Describe the behavior the person used, using 'I' statements.  
Talk about both what the person did and how it was done.  
Focus on body language, tone of voice and choice of words

**I**mpact: Explain how the behavior impacted the circumstances.  
Communicate how the behavior affected the organization, work team, program or customer.  
Communicate what you need to happen, and if appropriate, include a consequence if the desired behavior does not occur in the future.

### Example – Constructive Feedback for a Difficult Situation

**Situation** – I overheard you talking with Mrs. Smith's family on the phone...

**Behavior** – The tone of your voice sounded harsh to me.

**Impact –** Perhaps Mrs. Smith’s family member was angry and you felt you were not getting through to him or her. Our relationship with Mrs. Smith’s family may have been negatively impacted by the tone of voice you used.

**What I need:** I need you to be aware of this and use a tone of voice that demonstrates your willingness to assist. Let’s talk about how you can better handle a situation like this in the future.

### Example – Positive Feedback

When providing positive feedback, meet with the employee as soon as possible after the event has occurred and:

- Determine if a private setting is necessary. (Is the situation confidential?)
- Describe the situation, sticking to the facts.
- Describe the behavior observed in neutral terms.
- Explain the impact that positive behavior had on the event.
- Express appreciation for a job well done.

When using the SBI Framework to give positive feedback concerning a difficult situation, the person receiving the feedback understands exactly what they have done correctly and will be encouraged to behave that way again.

**Situation –** An angry family member called the facility (When Mr. Smith’s family member called yesterday...)

**Behavior –** You remained calm and clearly communicated the situation and the reasons behind it.

**Impact –** This put our facility in a good light and helped the Smith family understand how and why our program has the rules that it follows.

**Appreciation:** Well done! I appreciate your ability to stay calm under pressure and provide excellent customer service. You are a positive role model!

## CONDUCTING CONVERSATIONS WITH HIGH, MIDDLE and LOW PERFORMERS

Each employee can be placed into one of three categories—a High, Middle or Low Performer. Each of these categories can be defined generically:

- High Performer** - Consistently exceeds standards, proactively problem solves, takes appropriate initiative, and is a positive influence on others as well as a good role model.
- Middle Performer** - Meets standards, responds well to others' problem-solving ideas, strives to do a good job and may need more experience or coaching. May be influenced either by the high or the low performer.
- Low Performer** - Does not consistently meet standards, may respond to problems in a negative way. May not recognize the need for performance improvement.

A supervisor needs to communicate regularly with employees; it should not be a once-a-year conversation during performance review time. It is important to remember that all employees at all performance levels need regular positive feedback and when appropriate, constructive feedback and coaching to help them improve.

**High performers** are more likely to look for another job than other performers because they feel unrecognized and unrewarded. It is important to communicate to them regularly. When meeting with a high performer:

- Thank them for a job well done.
- Emphasize specifically where their actions make a positive difference in the workplace.
- “Re-recruit them” – ask what needs to be done to assist them in performing their current duties.
- Provide opportunities for them to grow beyond their current duties.
- Ask them to mentor others.

**Note:** It is also important not to continue to pile on the extra work because the high performer will get it done without complaint. At some point, the additional responsibility could become too much and the high performer might leave.



**Middle performers** are often seen as the steady contributors; the staff who do the job well most of the time. They might be ignored, however, as they usually do not cause problems or ask for opportunities to increase their skill or knowledge. It is important to communicate with middle performers regularly. When meeting with them:

- Thank them for their hard work.
- Emphasize specifically how their actions contribute to the overall success of your department/unit.
- Coach them in those areas that will assist them in better performing their current duties.
- Provide opportunities for them to grow beyond their current duties.

**Low performers** often take up a majority of a supervisor's time, as they require much attention to discuss inappropriate behavior. It is up to each supervisor to either assist the low performer in improving, or determine whether that staff member is in the appropriate position/department. It is important to communicate with low performers until their performance improves. When meeting with them, be focused, constructive and firm:

- Describe the unacceptable performance or behavior, using specific examples.
- Using the SBI method, explain the impact of their actions.
- State the desired behavior, performance or attitude.
- Remind them of the consequences if they do not improve their behavior or performance.

Your HR [Business Partner](#) is available to assist you while you are preparing to counsel or coach employees.

## COACHING FOR SUCCESS\*

### Effective Coaching is a Critical Component of Performance Management

When an area for improvement or a growth opportunity has been identified, the manager acting as coach yields the best results.

Coaching is a:

- Process of providing individuals with the knowledge, tools and opportunities they need to be more effective in their endeavors.
- Process that allows an individual to discover their own “best fit” and own “best self.”
- Personal paradigm shift for the manager.

Coaching is not:

- Counseling
- Mentoring
- Consulting
- Training

Coaching provides:

- Opportunities for individuals to become more committed to and more invested in the outcomes of their work and the overall success of the organization they work within.
- The glue that binds training with sustainable results.
- The leverage for individual strengths and abilities to achieve maximum performance.
- Proactive learning as well as reactive learning aimed at a particular situation or concern.
- A “safer” context for feedback and a stronger support for changed behavior.

\* Taken in part from Corporate Coach U, 2003

## MANAGERS and the PERSONAL PARADIGM SHIFT

For a manager to move from “supervisory” behavior to “coaching” behavior, the following shift in thinking and actions needs to occur:

Traditional Managerial Approach	Coaching Approach
Being focused only on the immediate outcome	Creating sustainable results and having employees who are fully engaged in their work as a bonus
Having complete control over employees' actions	Giving employees power to make decisions and act on them whenever feasible
Fear of consequences if the employee does not do the job well	Encouragement of guided risk taking and willingness to fail as part of learning
Pointing out weaknesses when the job is not done correctly	Recognizing strengths during the learning process
Being a problem solver for the employee	Assisting others in working through problems so the employee comes to their own solution
Listening to the words only during a performance conversation	Understanding the meaning and the emotions behind the words
Having the final word in difficult situations	Opening the door to collaboration and resolution to conflict

For more information on coaching, contact your [HR Business Partner](#) at the Medical Center or on the River Campus.

## CAREER DEVELOPMENT

An important component of the performance management process is to encourage and support continued growth and development of employees. Working with staff to enhance and improve their skills is a form of recognition, a tool for motivation and a benefit not only to the employee but to the organization. Continuous coaching and mentoring are an integral part of this process once a specific plan with measurable goals has been developed.

The following characteristics may identify an employee who is ready to grow:

1. Works independently
2. Uses sound judgment when she or he does not have clear direction
3. Is sought out to give help to co-workers or to those outside the department
4. Offers innovative ideas that are feasible
5. Asks clear questions when she or he does not understand what needs to be done
6. Provides solutions when presenting problems
7. Takes the initiative or a risk to try something new
8. Inspires others to do their best
9. Does whatever it takes to meet the deadline
10. Holds herself or himself accountable for quality results

Career development should be for all staff, not just those who want to learn more about their current responsibilities or how to move to the next level. *It should be noted, however, that career development activities will not always be upwardly focused, nor will they necessarily lead to salary increases.*

The implementation of a career development plan needs a strong commitment from both the employee and the organization. This requires the staff member and the supervisor to regularly define, develop, and refine his or her career goals, skills, aptitudes and responsibilities and be aligned with realistic opportunities for him or her in terms of the University's needs, requirements and strategic direction.

Supervisors support career management by:

- Engaging staff in discussions about the skills and knowledge to be developed, determining the level to be achieved, and proposing action plans.
- Providing honest feedback regarding the employee's skills, knowledge level and growth potential.
- Assisting in the creation of development plans which should include clear, specific, and attainable career goals.
- Suggesting resources to assist in reaching the goals.

It is the supervisor's responsibility to be aware of the appropriate resources both within and outside your department. Resources may include:

**LEARNING IN MyPath** at <http://mypath.rochester.edu/>

**HUMAN RESOURCE BUSINESS PARTNER** AT THE MEDICAL CENTER OR ON THE RIVER CAMPUS

Provide individual guidance in how to approach a problem and can help develop strategies for talking to a supervisor or a co-worker about a situation. In addition, some career coaching is available.

#### **TUITION BENEFITS**

University of Rochester sponsors and encourages employees to pursue college degrees. It's possible to take up to two classes per semester through the tuition benefits program. See specifics in the University of Rochester [Benefits Program](#).

#### **TOASTMASTERS**

Provides experience and peer feedback in presentation skills workshops such as "Speaking Skills for Beginners."

#### **UNIVERSITY JOB LISTINGS**

The University of Rochester initiative is to promote and transfer employees within the organization first. Job listings can be accessed online by logging in to the Human Resources Management System (HRMS) at <http://www.rochester.edu/working/hr/hrms> and selecting Self-Service > Recruiting > Careers.

**MENTOR/INFORMATIONAL MEETINGS INTERVIEWS**

Find a person who works in the field of interest. Assist the employee by setting up meetings with this mentor to discuss the job, what it takes to advance and succeed in the field.

**ON-THE-JOB TRAINING**

Set up scheduled time for employees to learn a new skill or apply new knowledge in a hands-on setting.

**PARTICIPATING IN PROJECTS**

Delegate responsibilities and projects to employees who are ready, willing and able to handle the growth opportunity.

**ROCHESTER WORKS!**

Provides individuals with help for establishing career plans through counseling, resume writing, networking and other developmental areas. Services are provided free of cost. Call 258-3500 or 266-7760 or go online to [www.rochesterworks.org](http://www.rochesterworks.org)

**AREA BOCES PROGRAMS**

Offer special adult education courses in many business-related topics.

**AREA COMMUNITY CONTINUING EDUCATION PROGRAMS****PROFESSIONAL ORGANIZATIONS**

The Monroe County area has numerous professional organizations. A complete listing of organizations is offered in a booklet published by the public library system.

Contact your [HR Business Partner](#) at the Medical Center or on the River Campus if you need assistance in creating a career management plan for your employees.