Performance Excellence

Administrator Guide

Contents

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
How to use this Administrator Guide

This planning guide provides Performance Excellence Administrators an overview of tools and resources available, equipping you to make Performance Excellence an even greater success in your area for this Performance year. Read through this planning guide to think through internal timelines, communications and staff and supervisor training for the current performance year.

Performance Excellence as a Tool for Engagement

Performance Excellence helps schools and units align individual work to their mission, increase performance, allocate resources to reward and retain the best people and support all staff to grow and develop. Ultimately, an immersive Performance Excellence experience can lead to engaged, high-performing staff and teams.

How does Performance Excellence Work? (Who does what)

Performance Excellence is guided and supported centrally, however many aspects are in the hands of schools and units. The table below shows the distribution of responsibilities and activities.

	Northwestern/ Office of HR	School or Unit & Admins	Manager or Supervisor	Staff
System	Supply online system, design improvements and help with difficult IT issues	Keep "reports to" data clean and manage day to day IT questions	Use system to record reviews and ratings (at a minimum)	Use system to record goals and self-review (at a minimum)
Timelines, goals and objectives	Provide University strategic goals and priorities.	Clarify unique timelines, school and unit level goals	Communicate team/group goals for alignment, clear expectations	Set SIMple goals, understand broader objectives and expectations
Communications	Send general communications	Send internal deadlines & reminders	Provide feedback	Solicit feedback
Training	Build and deliver training	Coordinate and/or deliver onsite training	Actively support and guide staff development	Own personal learning and development
Reviews, ratings and salary planning	Equip schools and units for success/ deliver myHR Learn reports	Merit/salary determination	Provide review & rating, Have performance conversation with staff member	Complete self-review/ Finalize Review & rating from Supervisor

The Administrator's Role

Administrators act as change agents for Performance Excellence within their areas. All administrator job aids can be found here in myHR Learn. Day-to-day activities of Performance Excellence Administrators typically include:

All of the time/ Most of the Time

Communicating to staff/supervisors
- Send deadline reminders/nudges to staff and supervisors
- Use weekly system reports to inform targeted reminders

Troubleshooting
- Correcting user errors
- Field system questions from staff and supervisors
- Manage reviews as needed (e.g. re-opening if submitted early)

Maintaining Clean Data
- Maintain/Updating myHR "performance reports to" data
- Change/update Performance Excellence review owners in myHR Learn

Some of the Time

Supporting Calibration or Salary planning
- Provide reports as input to calibration or salary planning
- Other Adhoc support for these processes

Coordinating or Delivering onsite training
- Work with your Human Resources Business Partner to coordinate delivery of training to your area.
- If you are interested in delivering training directly within your area, please let the Talent Development and Well-being team know

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Three Phases

Set Goals, Enhance Performance, Review Results

Performance Excellence is comprised of three phases that represent a continuous cycle of activities to align and focus work efforts and encourage ongoing conversations to increase performance. The phases delineate where we are in the performance year. Below is the recommended timing for each phase. Your local unit may have a different timing.

Sept- Oct   Nov-April   May-Aug
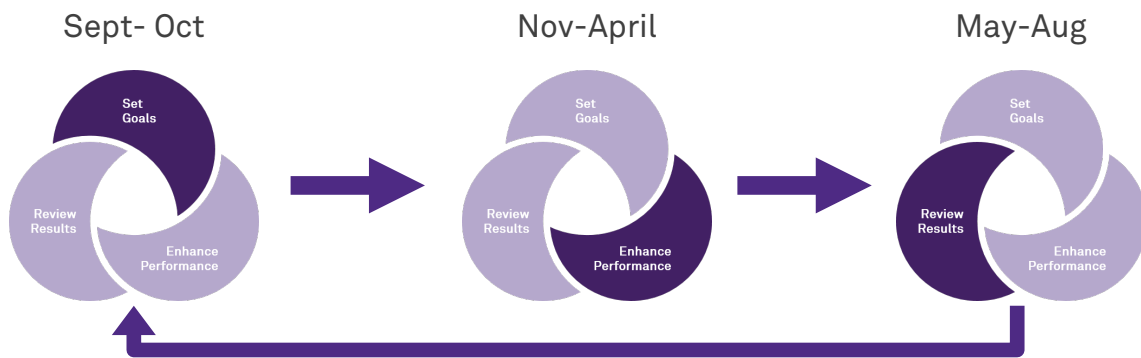
SET GOALS

What: Using the SIMple goal framework, staff members and their supervisors set 2-4 goals for the performance year that are Specific (measurable), Important (aligned to team objectives) and Meaningful (motivating to the individual). Ideally, teams or departments hold goal-setting sessions to work together to define goals. Goals may change throughout the year and may relate to core job responsibilities or special projects.

Timing recommendation: Use the annual performance conversation to discuss and draft goals for the performance year ahead. Finalize all Performance Excellence goals and enter into myHR Learn by the time Fall classes begin, or October 31st at the latest.

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ENHANCE PERFORMANCE

What: Ongoing feedback and coaching conversations, career conversations, development activities and stretch assignments help to enhance performance throughout the year. This phase is continuous, and supported by skills and confidence in soliciting and delivering quality feedback.

Timing recommendation: Development activities and feedback and coaching conversations should be continuous. We recommend that 1:1 check-ins about goals and performance should take place monthly. Also recommended is a dedicated career conversation mid-year using the career conversations guide.

REVIEW RESULTS

What: as the performance year comes to a close, supervisors prepare to write and deliver performance reviews and assign ratings. Typically, these reviews are a summary of conversations held throughout the year. Staff members also engage in written reflection through self-reviews. Performance ratings inform salary planning and merit decisions.

Timing recommendation: May-June, although it may be earlier or later due to business needs in specific schools and units.

SAMPLE TIMELINE

- 10/31   ALL GOALS ENTERED IN THE SYSTEM, 1ST CHECK-IN COMPLETE
- 1/31   2ND CHECK-IN COMPLETE
- 2/28   RECOMMENDED CAREER CONVO COMPLETE
- 3/15   3RD CHECK-IN COMPLETE
- 5/1   DEADLINE FOR SELF-REVIEW COMPLETE
- 6/1   DEADLINE FOR REVIEW & RATING DRAFTS (SAVED IN SYSTEM)
- 6/1-6/20   CALIBRATION MEETINGS (IF USED)
- 6/20-7/31   PERFORMANCE CONVERSATIONS, RELEASE OF REVIEW & RATING
- 8/1-8/25   SALARY LETTERS/CONVERSATIONS

Communications from the TDWB Team

The Talent Development and Well-being team will be your main contact (from Central) for anything Performance Excellence related. The role of TDWB is to provide you with information, communication templates, timelines about the Performance Excellence process that you can leverage in your local unit. We will also be your main liaison with Northwestern University Information Technology (NUIT) when there are technical issues.

Communications to PEX administrators via MS Teams

For our **primary mode of communications to admins**, we leverage **Microsoft Teams**, where we have an ongoing *Performance Excellence Administrator Community*, which you can join via this link.

In this community you will:

- Learn about the latest information and updates on Performance Excellence
- Connect with PEX admins from across the university
- Ask questions to the Admin Community about issues, problems, success stories

We recommend that you set your notifications for the channel so that you do not miss any important information. We also recommend that you tag the channel or the teams name so that others are notified when you post.

Communications to the TDWB Team

Any inquiries about Performance Excellence to pex@northwestern.edu.   While it is ok to also include individual people on the email, we require that you at the minimum include the main PEX email.

If it's a general/technical question, we recommend that you post on the Teams Channel as someone in the community can likely answer as well. We do not recommend you contact the team via direct Teams message with a specific issue

Resources

The TDWB team has created and provided different types of resources available to support the Performance Excellence Administrators. Synchronous and asynchronous trainings, along with job aids are available for each phase of Performance Excellence. Your school or unit Human Resources Business Partner can deliver training to your staff and supervisor community or you can become a Performance Excellence trainer for your area.

Live Virtual Trainings for PEX administrators

The TDWB Performance Management team hosts quarterly live virtual PEX administrator community of practice meetings that have cover specific topics and also allow for our PEX administrators an opportunity to connect and learn from other administrators and also raise questions, challenges, and other issues.

- Fall Community of Practice- Overall PEX year/calendar, what's new
- Winter Community of Practice- Review Owner/Performance Owner
- Spring Community of Practice- Administrator Training Refresh
- Year- End Community of Practice- Year-end preparation

To learn more and register for these community of practices, please join the *Performance Excellence Administrator Community*, via this link.

Resource	What's here?	Target Audience	Location/Link
Performance Excellence Administrator MS Teams Group		Administrators	Join via this link
Performance Excellence Administrator (tied to the MS Teams Group)		Administrators	Join the MS Teams group and you will automatically have access to the Sharepoint Link
Performance Excellence Website	SIMple Goal Setting Guides REAL Conversation planner Self-Review Guides Career Conversation Guides	Staff, Supervisors	https://perform.northwestern.edu/
myHR Learn	myHR Learn technical job aids	Staff, Supervisors, Administrators	myHR Learn Help

Communications Calendar (Topics subject to change)

This calendar includes messages related to Performance Excellence that schools and units may consider sending throughout the year. Messages from the Office of Human Resources about Performance Excellence will be included within monthly HR Newsletters. Templates for all messages, in easy cut and paste form, can be found throughout the year at this link:

Date	Message	Audience
Sept	***Prompt: Setting Goals***	*School/unit staff and supervisors*
Oct	***Reminder: Set Goals***	*School/unit staff and supervisors*
Jan	***Recommended Prompt: Remember to have a performance check-in (or career conversation)***	*School/unit staff and supervisors*
April	***Recommended Year-end Timeline Overview***	*School/unit staff and supervisors*
April	***Recommended Prompt: Write Your Self-Review***	*School/unit staff and supervisors*
June	***Recommended Reminder for supervisors: Writing review/rating drafts***	*Supervisors (staff and faculty supervisors)*

Plan your Approach

Using this planning guide for reference, download this worksheet from Box and plan out your year in advance:

Questions? Please contact: Northwestern Performance Excellence

pex@northwestern.edu