PERFORMANCE MANAGEMENT: YOU’RE MORE THAN A SCORE
Moving from a Scorecard to Meaningful Conversations

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Agenda

- Performance Assessment is Broken
- Setting the Stage for Change
- What is the Alternative?
- Implementation: Scope and Time Frame
- Challenges & Lessons Learned
- What’s Next?
I’m a Three, I’m A Three, I’m a Three

We only hear our “score,” and not what the conversation is or should be about.

“Performance ratings reflect so much more than actual performance. They have politics, tradition, and budgets all wrapped together in one number that will haunt you the rest of your life.”

–CBS Money Watch
WHAT are we looking for?

Effective performance management:

- is simple and efficient
- promotes open & ongoing communication
- is employee driven
- helps create a culture of transparency
- is consistent but flexible
- allows you to revisit and adjust goals as necessary
- keeps employees on track, motivated & engaged
WHAT DO THESE COMPANIES HAVE IN COMMON?

Deloitte.

Cargill

UBT Union Bank & Trust

NETFLIX

Atlassian

Fishbowl

Juniper Networks

Adobe

CACUBO
## Performance Management

### THEN

- **Traditional Annual Performance Evaluation**
  - Scorecard evaluation completed once per year for budget requirements
  - Standardized ‘one-size-fits-all’ approach
  - Supervisor-driven: cumbersome and inefficient
  - Demotivating process focused on fixing employee weaknesses
  - No formal goal-setting process
  - Performance feedback given only once per year

### NOW

- **Performance Management Conversations**
  - Frequent conversations throughout the year focused on staff growth and development
  - Flexibility for meaningful conversations tailored to employee and department needs
  - Employee-driven to give ownership to staff and reduce bureaucratic tasks for supervisors
  - Process designed to enhance employee performance by focusing on talents and strengths
  - Discussion around upcoming priorities ensures alignment with supervisor, department and IANR
  - Real-time, frequent feedback leads to enhanced performance and productivity
PERFORMANCE MANAGEMENT

HERE IS HOW IT WORKS

5 questions | 2 times per year (or more)

1. Employee schedules PM conversation
2. Employee and manager prepare for discussion
3. Conversation takes place
4. Employee summarizes conversation online
5. Manager reviews, adds comments, and finalizes
CHALLENGES AND LESSONS LEARNED

**Challenges**
- Fear of the unknown
- How conversations tie to merit
- Broad scale communication
- Data access, clean up, setup, and security

**Lessons Learned**
- Leadership buy-in is critical
- Pilot the process
- Be prepared to address employee concerns and challenges
- Simplicity is key
Thank You

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