

# MassPerform

## Program Guide and Check-in Toolkit

---



# MassPerform

---

**We've developed a number of guides and worksheets to help make Check-in successful. They align to the three phases of Check-in – Expectations, Feedback, and Development. The following documents are enclosed in this toolkit.**

## Program Guidelines

### Expectations

- Expectations discussion guide for employees
- Expectations discussion guide for managers
- Expectations worksheet

### Feedback

- Feedback discussion guide for employees
- Feedback discussion guide for managers

### Development

- Development discussion guide for employees
- Development discussion guide for managers
- Individual success plan

# Program Guidelines

---

**MassPerform consists of a minimum of four Check-ins followed by a wrap up.**

Event	Date
Kickoff 1 <sup>st</sup> Check-in	July - September
2 <sup>nd</sup> Check-in	October - December
3 <sup>rd</sup> Check-in	January - March
4 <sup>th</sup> Check-in	April - June
Wrap Up	June

## 1<sup>st</sup> Check-in (July - September)

- Manager should schedule a meeting with their employee
- Manager should set expectations of employee
- Employee should develop SMART goals based on those expectations
- Set the cadence of future Check-ins (minimum of 3 more; once per quarter)

### After the 1<sup>st</sup> Check-in:

Employee logs into the MassPerform system\* to confirm:

- Did you meet with your manager to begin the MassPerform program?
- Did you set up a regular cadence of Check-ins that fits the needs of the team and/or business?
- Were expectations set to clarify the goals for the year ahead?

### Best practice recommendations:

- After the 1<sup>st</sup> Check-in the employee should summarize the conversation in a brief email and send it to the manager. This will ensure both employees and managers are on the same page.
- Employees should utilize *Expectations Worksheet* to draft goals based on their manager's expectations.

## 2<sup>nd</sup> through 4<sup>th</sup> Check-in

- Manager provides feedback to employee.
- Manager and employee reviews and updates expectations and goals to fit business needs.
- *Optional:* Employee discusses professional development and develops an Individual Success Plan (ISP). See *Development section of toolkit for more information and ISP worksheet.*

## Wrap Up (June)

- Manager provides feedback for the past year.

### During the Wrap Up:

Employee logs into the MassPerform system\* to:

- Enter accomplishments and their positive impacts from the year.

### Manager logs into the *MassPerform* system\* to:

- Confirm:
  - Did you meet with your employee for a minimum of four Check-ins?
  - Did you set expectations with your employee during Check-ins?
  - Did you provide feedback to your employee during Check-ins?
- Enter accomplishments and their positive impact for the employee.
- Enter rating:
  - **Exceptional**
    - Performance in this category consistently far exceeds requirements, reaching a level found only in a small percentage of managers. Exceptional performance is associated with work on a project or objective outside the ongoing area of responsibility and which resulted in measurable impact. This rating is not attainable by someone exclusively performing their regular duties flawlessly. Achievements, effort, and results are well beyond those expected at this management level, and contributed to a significant organizational accomplishment in terms of increased efficiency, innovative approaches, or significant cost savings. This exceptional manager sustains exemplary accomplishments at the highest level throughout the evaluation period; providing exemplary support to the contributions of the organization; and demonstrates “whatever it takes” and “above and beyond” philosophy.
  - **Highly Effective**
    - Performance in this category consistently exceeds performance standards for assigned responsibilities. The manager who exceeds expectations requires little supervision, regularly brings forward and champions strategies for improving services and/or reducing costs, and surpasses required standards and performance expectations. He or she is committed to continuous improvement and enhanced services, and displays deep dedication to the agency’s mission and goals. There is little if any room for improvement in fulfilling their regular job functions and agency strategic objectives.
  - **Successful Performer**
    - Performance in this category meets performance standards. Managers who meet expectations consistently deliver expected results, fulfill job requirements and goals, and are valued members of the management team. These are solid accomplished managers who significantly contribute to the success of the agency and have a positive impact on the organization. Performance is on par with other managers and is what is expected for their level of responsibility.
  - **Below Expectations**
    - Performance in this category is consistently unacceptable. Managers who do not meet expectations need significant measurable improvement in the near future or face disciplinary action up to and including termination in the next six months.

### After Wrap Up:

#### Print form and place in personnel file

\*The MassPerform System is SuccessFactors, the same system as ACES. To access your *MassPerform* form, log into the ACES system (same username and password).



### Guidelines:

- *Take time to do this well: Clear expectations are key to an effective relationship with your manager.*
- *Use the expectations worksheet to start mapping out your goals.*
- *Come to the meeting prepared to review a draft of your SMART goals.*
- *Remember: Expectations must be tangible and measurable, not just aspirational.*
- *Ask a lot of questions.*

### 1. Goal

- “Over the next period of time (e.g. week, month, quarter), what are the critical priorities that we must accomplish?”
- Check your understanding of the business context: “How does our team support the larger work of the agency or secretariat?”
- “What are your big projects for the next year?”
- “What key deliverables should I aim for this year?”

### 2. Reality

- Review your expectations worksheet with your manager and complete your goals together:
  - “Do you think these goals are stretching enough for me? Am I being unrealistic?”
  - “How will I be measured on these?”
  - “Are these properly aligned to the business goals? If not, how can I ensure that they are?”

### 3. Options

- Have specific tasks tied to the expectations. Not just what will be achieved, but HOW.
- “From your experience, what obstacles should I anticipate?”
- “Who else should I connect with to help achieve these goals?”
- “What other resources do you think I will need?”

### 4. Way Forward

- Confirm how often you would like to review progress: weekly/monthly/quarterly.
- Confirm your immediate next steps, (e.g., finalize SMART goals).
- Take the opportunity to double-check your understanding of what is expected of you.

### Follow-Through:

- *Finalize your goals and share with your manager.*
- *Before your next Check-in, reflect on progress made. What has been harder/easier than you thought?*
- *Regularly ask for business context.*



## Guidelines:

- *Take time to do this well: Clear expectations are key to an effective relationship with your team.*
- *As a manager, you will drive the expectation setting process.*
- *Check you have clarity of your own expectations before having this conversation.*
- *Remember: Expectations must be tangible and measurable, not just aspirational.*
- *Utilize the GROW Model.*

### 1. Goal

- Confirm the overarching goals for the agency and secretariat this year.
- “How do these goals align with the business/team goals?”
- Be transparent and explain what is expected of you as a manager of this team.
- “What actions would you take to achieve this expectation?”
- “How will you know you have accomplished this goal?”
- “How will these goals stretch you?”
- Check that the goals the employee has drafted are SMART and complete them together.

### 2. Reality

- “What barriers, obstacles or constraints stand in the way of you accomplishing this goal?”
- “Is this timeframe realistic?”
- “What if the barrier or constraint were removed, would this change things?”
- “What can I do to help?”

### 3. Options

- Ensure the employee has specific actions tied to the expectations. Not just what will be achieved, but HOW.
- “How will you plan to overcome any obstacles?”

### 4. Way forward

- “When and how shall we Check-in to review progress?”
- Explain that expectations may need to evolve if the broader business goals change.
- Clarify that you will hold your employee accountable to these expectations, so it’s important for them to let you know if they need to revisit them.

## Follow-Through:

- *Finalize your expectations and share with your employee.*
- *Before your next Check-in, reflect on progress made. What has been harder/easier than you thought?*

# Expectations Worksheet



## What are expectations?

Setting expectations is the first of three steps in the *MassPerform* Check-in process: you and your manager agree upon key deliverables, behaviors and results for the fiscal year.

Employees are required to set goals based on these expectations. Goals define the specific steps employees will take to meet the expectations.

Employees and managers should review expectations regularly to ensure they remain relevant as business priorities and circumstances change.

### Employee & manager responsibilities

- The manager is responsible for ensuring that employees receive clear expectations that are aligned with key business needs and priorities.
- The employee is responsible for drafting appropriate goals that align to each expectation and to review these regularly with his/her manager.
- Both the manager and employee provide constructive feedback on what's working and what could improve.

### Getting started

- Managers discuss and set clear expectations with their employees
- Employees draft SMART goals to fulfill business expectations
- Employees review and refine goals with their manager
- Managers and employees ask for and give frequent feedback on performance against expectations
- Managers and employees revisit and revise your expectations in Check-ins throughout the year

**SMART** is an acronym that can help you and your manager identify the associated goals and success criteria for each of your manager's expectation.

**SPECIFIC:** Who, what, where, when, and why of the achievement

**MEASURABLE:** Clear measures of success, key metrics and milestones

**ATTAINABLE:** Achievable and provides a stretch opportunity to develop and grow

**RELEVANT:** Results focused, aligned to Org/BU priorities, and produces tangible results

**TIME-BOUND:** A due date gives focus and sense of urgency to the work

## Instructions

Identify the specific goals associated with each of your expectations. Describe the goal, success and measurable result, and the associated due dates.

EXPECTATION:		
GOAL 1:	DEFINE SUCCESS:	DUE DATES:
GOAL 2:		
GOAL 3:		
EXPECTATION:		
GOAL 1:	DEFINE SUCCESS:	DUE DATES:
GOAL 2:		
GOAL 3:		
EXPECTATION:		
GOAL 1:	DEFINE SUCCESS:	DUE DATES:
GOAL 2:		
GOAL 3:		





## Guidelines:

- *As an employee, you will be part of a two-way feedback conversation.*
- *Provide timely, specific, balanced feedback.*
- *Don't give feedback when you are angry.*
- *Ask lots of questions to ensure you are clear about the feedback you're receiving.*
- *Remember: Constructive, critical feedback is often the most helpful to people. Don't avoid the tough conversations and be open to hearing difficult feedback.*

### 1. Specifics

- "What do I do well that makes me effective? Why is that impactful?"
- "Are there any areas of performance concern that I need to be aware of?" Ask for specific examples.
- When providing feedback, state the specific facts that you know: "I have observed that you do/say \_\_\_\_\_ and it impacts me in this way \_\_\_\_\_."
- Confirm the overarching goals for the agency and secretariat this year.
- Explain your big projects for the next year.

### 2. Ask

- Pause and take time to respond to the feedback.
- Ask for suggestions:
  - "What should I stop, start, continue to do?"
  - "What is one thing, looking forward, I could change or do more of that would make me more effective?"

### 3. Impact

- When receiving feedback, consider the impact of your behavior on the situation/team. Do you need to take further action to change that impact?
- When providing feedback, describe the impact you observed on other people, both positive and negative

### 4. Do

- Collaboratively agree on what needs to continue or change:
  - What will you do differently in the future?
  - What help/support would you like from your manager or others to help you stay on track?
  - Say thank you for the feedback

## Follow-Through:

- *Put agreed-upon changes into action.*
- *Before your next Check-in, consider what feedback you would like to provide.*
- *Regularly ask for business context, changes, and risks.*
- *Regularly ask for informal feedback, not only in your Check-in conversations.*



## Guidelines:

- *As a manager, you will be part of a two-way feedback conversation.*
- *Provide timely, specific, balanced feedback.*
- *Show genuine appreciation for your team members and the value they bring to the team.*
- *Motivated employees want to know how they're doing, tell them!*
- *Don't give feedback when you are angry.*
- *Remember: Constructive, critical feedback is often the most helpful to people. Don't avoid the tough conversations and be open to hearing difficult feedback.*

## 1. Specifics

- Provide specific feedback based on your observations:
  - "X is something you do very effectively."
  - "I really appreciate your contributions to (project/team/department) by doing X."
  - "Looking forward, if you could change or do more of X it would make you more effective."

## 2. Ask

- PAUSE and ask for the other person's reaction.
- Ask open-ended questions to understand their perspective:
  - "If you could do it again, what would you do differently?"
  - "How did you feel following that situation?"

## 3. Impact

- When receiving feedback, consider the impact of your behavior on the situation/team. Do you need to take further action to change that impact?
- When providing feedback, describe the impact you observed on other people, both positive and negative.

## 4. Do

- State or collaboratively agree on what needs to continue or change:
  - "Can I make a suggestion?" ...
  - "What help/support would you like from me to help you stay on track?"
  - "What feedback do you have for me?" – remember to say thank you for feedback received.

## Follow-Through:

- *Put agreed-upon changes into action.*
- *Regularly provide informal feedback to team members – after meetings, presentations, etc.*
- *Appreciate your team often and in a way that is meaningful for each of them.*
- *Remind your team that you are open to hearing their feedback.*



## Guidelines:

- *Expectations and Feedback Check-ins must happen before a development conversation.*
- *Reflect on interests and aspirations (use Individual Success Plan).*
- *Schedule meeting with your manager. You will likely have a series of meetings, not just one.*
- *Come to the meeting with some clear ideas to discuss.*
- *Remember this is a journey: don't move straight to action.*

## 1. Current State

- Explain what you find most and least satisfying about your current role and why.
- Discuss other things you really enjoy doing and why.

## 2. Strengths

- Explain what you believe your strengths and development areas are.
- “Does this align with your perspective? Is there something I’m missing?”

## 3. Aspirations

- When receiving feedback, consider the impact of your behavior on the situation/team. Do you need to take further action to change that impact?
- When providing feedback, describe the impact you observed on other people, both positive and negative.

## 4. Plan

- “I’ve identified some experiences, coaching or learning to help me develop. What do you think is missing?”
- Discuss the potential results/business impact of these activities.
- “How did you develop your own career?”

## 5. Action

- Discuss specific actions you can take to achieve your goal(s).
- Agree upon a realistic timeframe and how to track progress against actions.
- Consider potential obstacles and how you will overcome them.

## Follow-Through:

- *Employee completes Individual Success Plan (ISP).*
- *Schedule a follow-up meeting with manager to review progress.*
- *Ideally, you should review Success plans every 3-6 months as part of Check-in.*
- *Explore online resources and internal opportunities (roles, transfers, projects, etc.).*
- *Before your next development Check-in with your manager, reflect on the progress you've made.*



## Guidelines:

- *Expectations and Feedback Check-ins must happen before a development conversation.*
- *Encourage don't direct.*
- *Support employees on their development journey.*
- *Provide business context.*
- *Listen 70%/Talk 30%.*
- *Provide clarity, but don't feel like you have to have all the answers.*
- *Remember this is a journey: don't move straight to action.*

## 1. Current State

- "What parts of your current job do you find most satisfying and why?"
- "What parts are less satisfying and why?"

## 2. Strengths

- "What are your key skills and strengths?"
- "What is a critical development area for you?"
- "What business trends or skills do you need to learn more about to remain relevant?"

## 3. Aspirations

- "What are your short and long-term career goals?"
- "Let's look at how your aspirations link to the agency or secretariat goals."
- "Do you have a specific career move that you want to make?"

## 4. Plan

- "What types of experiences, coaching, and/or learning do you need to fulfil your aspirations?"
- "What will be the potential results/business impact of these activities?"
- "As your manager, how can I help?"

## 5. Action

- "What specific actions can you take to achieve your goal(s)?"
- "What obstacles, if any, may get in the way?"
- "How would you like us to monitor your progress against these goals?"

## Follow-Through:

- *Employee completes the Individual Success Plan (ISP).*
- *Guide employee to online/on-demand resources.*
- *Explore internal opportunities (roles, transfers, projects).*
- *Confirm date for next development Check-in to review progress.*
- *Ideally, you should review success plans every 3-6 months as part of Check-in.*

# Individual Success Plan (ISP)

## Objective:

Create a personal success plan that aligns your strengths, career aspirations and business needs.

<b>WHAT ARE YOUR SHORT AND LONG-TERM CAREER GOALS?</b> <i>This includes experiences you would like, not just promotions (e.g., running an event, speaking at a conference, etc.)</i>	
<b>Short Term (6-12 months):</b>	<b>Long Term (2 to 5 years):</b>
<b>WHAT TYPE OF ASSIGNMENTS, EXPERIENCES, COACHING AND/OR LEARNING DO YOU NEED TO MEET YOUR GOALS?</b>	
	<b>How can your manager help?</b>

## Action Plan:

*Complete during or after development discussion with manager*

DEVELOPMENT OPPORTUNITY	SPECIFIC ACTIONS YOU WILL TAKE	BUSINESS IMPACT/RESULTS	COMPLETION DATE

## Next Steps:

Best practices indicate that you should review success plans every 3-6 months as part of Check-in.

Next Success Plan Review Date: \_\_\_\_\_