MassPerform

Expectations Feedback Development

Program Guide and Toolkit

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What's Included in this Guide

This Program Guide and Toolkit provides an overview of the MassPerform program, key definitions used throughout the process, a Checklist for both Managers and Employees, and essential information and resources about Expectations, Feedback and Development designed to help make your performance conversations more successful.

MassPerform Overview

What is MassPerform?

MassPerform is the Commonwealth's performance management model for Managers, centered around meaningful conversations about performance.

The goal of MassPerform is to create a performance culture where timely, relevant feedback drives change and delivers meaningful business outcomes through a coaching /check-in model focused on:

- Managers setting clear **Expectations**,
- Sharing two-way **Feedback**, and
- Employee driven **Development**.

As demonstrated by the graphic to the right, these three components are the foundation of MassPerform conversations. An overview of each element is available later in this guide.

MyPath System

Although MassPerform occurs primarily in conversations, the model is supported by a new Commonwealth-wide system called **MyPath**, which will serve as a central resource for managers to complete performance management tasks and access learning and training tools. *MyPath* will:

- ✓ Support the alignment of performance expectations and goals, memorialization of feedback, as well as optional employee-led development planning.
- ✓ Allow manager and employees to add/modify expectations and goals throughout the year, as necessary.
- ✓ Automatically generate personal, action-oriented communications during the review cycle to help users remember key dates and tasks.

MassPerform Participant Eligibility

Manager-level employees hired on or before December 31st are eligible to participate in MassPerform and will receive a final review and rating.

- **On Cycle Hires**: Employees in a Manager-level position as of the first day of a new review cycle (first Monday in July) are considered On Cycle Hires and will begin the Kickoff phase of MassPerform on the first day of the new Fiscal Year.

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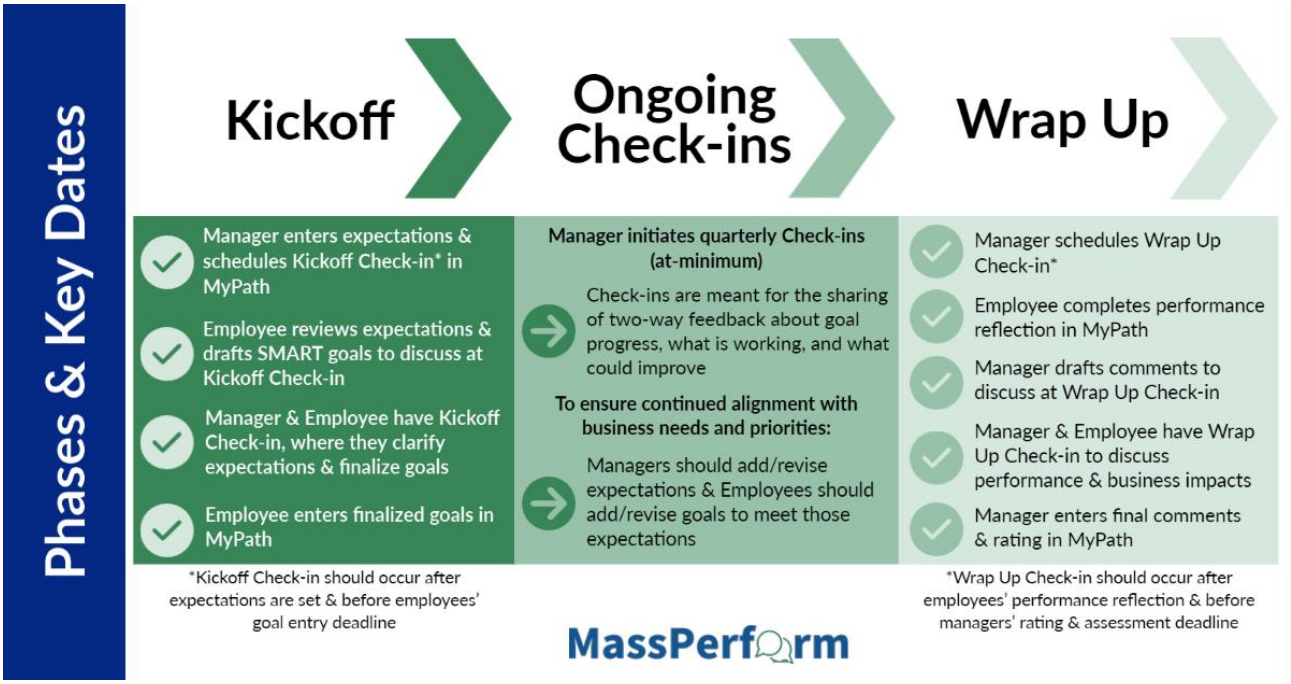
- **Off Cycle Hires**: Employees hired *after* the first day of a new review cycle and on/before December 31st are considered Off Cycle Hires. Off Cycle Hires will begin the Kickoff phase of MassPerform upon their manager-level position start date and will be eligible for a final performance review and rating.
- **Employees Hired after December 31st**: Newly hired employees or employees promoted to a manager-level position after December 31st are ***not eligible*** to receive a final review and rating. Although these employees will not formally participate in MassPerform until the following review cycle, best practice is for managers to still set clear expectations for these employees and for employees to set goals to achieve those expectations.

Visit the MassPerform webpage for resources to help maximize your MyPath experience.

MassPerform Timeline

As illustrated below, MassPerform begins with the **Kickoff** phase of expectations and goal setting, followed by **ongoing Check-ins** to review progress and to adjust expectations as necessary based on business needs, then concludes with the **Wrap Up** phase, where employees and managers reflect on performance over the year before the manager assigns and delivers the final performance review and rating. The MassPerform webpage provides an overview of the Key Program Events.



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MassPerform Vocabulary

MassPerform: A collaborative approach between managers and employees to engage in candid conversations about performance.

Manager: A manager who supervises another manager. Managers are responsible for drafting expectations, providing feedback on progress, and completing the annual evaluation. Managers are responsible for ensuring that employees receive clear expectations that are aligned with key business needs and priorities.

Employee: A manager who reports up to another manager. The employee is responsible for detailing expectations with one or more goals that achieve the expectation.

Expectation: Key deliverable, behavior and/or business result clearly defined by the manager.

Goals: The specific steps employees will take to meet the expectations. **SMART** is an acronym that can help identify goals and success criteria for each expectation:

SPECIFIC:	Who, what, where, when, and why of the achievement
MEASURABLE:	Clear measures of success, key metrics and milestones
ATTAINABLE:	Achievable but also provides a stretch opportunity to grow and develop
RELEVANT:	Results focused, aligned to Unit/Agency priorities, and produces tangible results
TIME-BOUND:	A due date gives focus and sense of urgency to the completion of the work

Feedback: Information (positive and constructive) about an employee's past performance, delivered in the present, to influence future performance.

Development: A collaborative plan initiated by the employee and supported by the manager; a plan that identifies short and long-term skill development that aligns the employee's strengths and career aspirations with the business needs.

Coaching: Creating a shared understanding about what needs to be achieved and how results are generated. Effective coaching requires managers to transition from telling and directing the employee to asking more and saying less when discussing performance.

Check-ins: A simple, agile framework for candid conversations about performance between a manager and employee. These conversations happen a minimum of 4 times a year.

Kickoff: The start of the MassPerform cycle when managers and employees meet to set expectations and goals for the year ahead.

Wrap Up: The end-of-the-year activity to memorialize significant accomplishments and their impact and other pertinent information from the year's 4 plus check-in conversations. During wrap-up, the manager will provide the employee with a final rating and summary comments.

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What do I need to do?

Manager Checklist

1. Kickoff
   - ❑ Check out the *Getting Started – Setting Expectations* guide for more details!
   - ❑ Login to MyPath to enter date of Kickoff Check-in and establish a cadence of future Check-ins.
   - ❑ Send **Outlook** meeting invites for each of your Check-ins.
   - ❑ In MyPath, enter expectations for the new fiscal year.
2. Ongoing Check-ins
   - ❑ Check out the *Getting Started – Delivering Feedback* guide for more details!
   - ❑ Adjust expectations to align with any changes to business priorities.
   - ❑ Exchange ongoing feedback with employees; record comments in MyPath if desired.
   - ❑ Participate in employee-initiated development conversations (optional).
3. Wrap Up
   - ❑ Check out both the *Getting Started – Wrap Up* and *Ratings* guides for more details!
   - ❑ Review employee's performance reflection comments.
   - ❑ Meet with employee for final Check-in to discuss year's accomplishments and business impact prior to the rating process.
   - ❑ Writes comments about the employee's performance in MyPath and assign rating.
   - ❑ Once ratings are approved, meet with employee to deliver and discuss final rating.
   - ❑ Signs performance review in MyPath.

Employee Checklist

1. Kickoff
   - ❑ Once notified, review your manager's expectations in MyPath and draft goals for each expectation to share and finalize at your Kickoff Check-in.
   - ❑ Confirm cadence of Check-ins throughout the year.
2. Ongoing Check-ins
   - ❑ Check out the *Getting Started – Delivering Feedback* guide for more details!
   - ❑ Discuss any changes to your manager's expectations, and if necessary, create new corresponding goals.
   - ❑ Exchange ongoing feedback with your manager; record comments in MyPath if desired.
   - ❑ Initiate development conversation about short-term and long-term career goals (optional). Check out the *Getting Started – Managing the Development Check-in* guide for more details on driving your own development.
3. Wrap Up
   - ❑ Check out the *Getting Started – Wrap Up* guide for more details!
   - ❑ Complete Performance Reflection in MyPath, summarizing your accomplishments for the year.
   - ❑ Meet with manager for final Check-in to discuss your performance for the year
   - ❑ Meet with manager for rating conversation.
   - ❑ Sign performance review in MyPath after manager signs.

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Expectations

An expectation is a key result, deliverable or behavior change by a specified time given by a manager to an employee. Expectations should help an employee understand how their actions fit into the larger strategic objectives of the business unit and the organization. A manager's expectation(s) may be related to the expectations provided by his or her supervisor and cascaded down to an appropriate level.

While the manager is responsible for setting expectations, the discussion about how the employee will deliver on those expectations should be collaborative, merging the manager's knowledge, skill, and subject expertise with the perspective of the employee.

Expectations can be adjusted throughout the year to reflect changes in business priorities, providing flexibility.

Benefits of Expectations Setting

- ✓ Managers are more successful when their team / unit clearly understands what is expected.
- ✓ Employees are enabled to focus their efforts on business needs that really matter once they understand the impact of their contributions.
- ✓ Work becomes more meaningful, as employees understand how their actions fit into the larger strategic objectives of the business unit and the organization.

Tips for Setting Expectations

- ✓ Expectations can come from a variety of sources – the employee's job description, current projects / initiatives, expectations cascaded from your own manager, etc.
- ✓ When determining expectations for an employee, managers can ask themselves: *What do I want/need this employee to accomplish this year?* Or *What business outcomes do I expect from this employee this year?*

Goals

Managers' expectations provide employees with an important high-level overview and direction for their work, but **employees** are responsible for defining the *specific steps* that they will take to achieve their manager's expectations. The use of SMART goals assists with this process:

- ✓ **S**pecific
- ✓ **M**easurable
- ✓ **A**ttainable
- ✓ **R**elevant
- ✓ **T**ime-bound

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Distinguishing Expectations and Goals

A helpful analogy for expectations and goals is that of a road trip:

- Expectations are the *destination* of the trip, determined by the manager (e.g., arrive in San Francisco by *date*).
- Goals are the specific *route details,* planned by the employee (e.g. we will travel by car, depart on *date,* refuel at *x,y,z* locations, and arrive by *date*).

Sample Expectations and Goals:

Expectation: Modernize the grant application process by June 30th to reduce processing time by 15%.

- *Goal:* Procure new application processing software by December 15th.
- *Goal:* Hire two new employees to support the application process by March 1st.

Expectation: Produce accurate annual report detailing program activities.

- *Goal:* Create spreadsheet to track monthly accomplishments to include in annual report.
- *Goal:* Provide draft report to program directors for review, allowing at least two weeks for input before publishing.

Roles and Responsibilities

- **Managers** are responsible for delivering clear expectations to the employee that are aligned with business needs and priorities.
- **Employees** are responsible for drafting appropriate goals that support the accomplishment of each expectation and to review these regularly with his/her manager.
- **Managers** and **employees** provide balanced feedback about what is working and what could be improved when regularly reviewing expectations/goals.
- **Managers** revise expectations to ensure the established expectations and goals remain relevant as business priorities and circumstances change.

Resources

Learning:

- Complete the *Introduction to MassPerform* training for an overview of MassPerform.
- Check out the Job Aid: Asking Questions for additional ideas on how to get the information you need to make effective decisions.
- Getting Started – Setting Expectations guide for Managers.
- Manager Planning Tool for Setting Expectations.

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Feedback

The purpose of ongoing Check-ins is to provide a forum for **two-way feedback** about performance, update on progress, and support needed to achieve objectives.

Feedback should be:

- ✓ **Balanced**. Comment on both *what is working well* and *what could be done differently*; on both what is being accomplished and how results are generated (what skills are being used).
- ✓ Delivered **incrementally**. Feedback engages the process of continuous improvement that enables skills to be built progressively step-by-step over time versus by leaps and bounds.
- ✓ **Skillful**. The skills for requesting, giving, and receiving feedback, as well as managing defensiveness are available in the *Turning Feedback into Change* course.

Benefits of Feedback

- ✓ Frequent feedback ensures the employee is clear about expectations and how to achieve success. For example, feedback re-directs an employee driving to Montreal when the expectation was to arrive in Worcester.
- ✓ Feedback motivates future effort for the employee who want to do their best!
- ✓ Two-way feedback generates higher-level business outcomes as managers and employees identify what is working and what is not; then plan steps to achieve success.

Difference between a MassPerform Check-in and a Business Touch-base

- Quarterly MassPerform Check-ins move beyond the *daily discussion about business issues* - or **what** is being accomplished - to talk about big picture about **how** an employee is generating results and meeting expectations. The **how** refers to specific skills being used or the identification of skills to be enhanced or developed to achieve success.
- Check-ins also allow managers an opportunity to address an issue or pattern of behavior that requires a longer conversation than in-the-moment feedback.

Roles and Responsibilities

- **Managers** initiate Check-ins based on the agreed upon cadence, or as often as needed.
- **Managers** observe ongoing performance and provide balanced feedback (what is working well *and* what could be done differently).
- **Employees** share progress on agreed upon goals and share balanced feedback.
- **Both** manager/employee complete *Turning Feedback into Change* and the online communication skills modules to build the skills that effectively manage feedback.
- **Managers** revise expectations to reflect changes in business priorities.

Resources

Learning:

- See your Secretariat training schedule for *Turning Feedback into Change*.

Job Aids:

- Job Aid: Asking Questions
- Job Aid: Effective Listening
- Job Aid: SARAH Cycle and 3 Triggers

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Development

Professional development can be related either to skills needed in an employee's current role or those needed for their next opportunity.

In MassPerform, ***Employees*** are responsible for initiating conversations about development with their managers. Employees create a development plan to review with their manager, who will provide them with support as they seek to achieve their goals.

Informal development also occurs for *all managers* when they respond to one another's feedback, turning it into change. The more frequently managers meet to exchange feedback, the greater the potential for skill development and continuous improvement. When a manager's skills improve, their unit's skills and overall culture improve, too.

Benefits of Development

- ✓ Employees build greater breadth and depth of technical and soft skills.
- ✓ Employees report greater job satisfaction.
- ✓ Managers report greater individual and unit productivity.
- ✓ The unit/agency's talent pool grows.

Roles and Responsibilities

- **Employee** creates a development plan in **MyPath**.
- **Employee** schedules a meeting with their manager.
- **Manager/employee** meet to discuss employee's short and long-term interests.
- **Managers** provide support needed for the employee to achieve their objectives.

Resources

Development Ideas:

- Provide an additional project and/or responsibility.
- Identify a stretch assignment in a related area of the business.
- Shadow next-level meetings.
- Grow the employee's sphere of influence by asking them to make contact when initiating a project/event.

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MassPerform Support

Training and Resources

The MassPerform Training, Resources and Job Aids page contains a variety of resources to support managers throughout the performance review cycle. It is recommended that participants visit this page to learn more before beginning each new phase of MassPerform (Kickoff, Ongoing Check-ins, Wrap Up).

Coordinators

MassPerform Coordinators are local subject matter experts in the MassPerform model for their Agency or Secretariat.

- Throughout the performance review cycle, Coordinators are available to guide participants through various stages of the MassPerform model and recommend resources to ensure successful performance management conversations.
- To provide you with the best level of support, MassPerform Coordinators are *not* intended to be MyPath system experts or support. See below for MyPath support details.
- The MassPerform team understands the value of feedback! If you have any feedback about MassPerform at any point throughout your experience, please share it with your MassPerform Coordinator.

Visit the MassPerform Coordinators page to identify your Agency or Secretariat's coordinator.

MyPath

For assistance with the MyPath system, contact the Employee Service Center at 617-979-8500 or MyPath@mass.gov.

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