1. Mutually develop performance plan

2. Monitor and document performance

3. Provide Coaching and Development

4. Evaluate Performance

5. Communicate the evaluation

6. Reward Performance
Performance Management is a joint program intended to advance AUBMC mission and vision by aligning individual employee contributions with the hospital’s goals; Performance Management is a joint collaboration effort between a supervisor and an employee utilizing the concepts of coaching, supporting and developing.

Performance management is not a yearly task however it is based on an on-going process which leads to the appraisal:

- Planning work, setting expectations (standards and competencies) and goal setting
- Continuously monitoring and documenting
- Coaching & developing employee in order to reach their full capacity
- Evaluating performance through the probationary, mid-year or yearly performance appraisal
- Communicate with the employee regarding his/her ratings
- Rewarding good performance

**Strengths of Performance Management**

- Reinforces the mission and vision of AUBMC while linking employee performance to the strategic focus of AUBMC.
- Core competencies are accentuated and discussed with employees.
- Ensures employees are familiar with the expectations of the organization and their supervisors, the goals they are expected to meet, and the criteria that will be used to evaluate their performance.
- Supervisors acknowledge good performance immediately, reinforcing desired behaviors and performance, and address problems as they arise.
- Supervisors observe and record specific examples (critical incidents) as they occur.
- Documentation is an ongoing process that provides a comprehensive, detailed, and accurate picture of the employee’s performance over time.
- Involves continuous monitoring, coaching and feedback.
- Includes self-evaluation by employees who have an understanding of their place in the organization and their contributions to its success.
- The formal evaluation becomes a summary of ongoing performance discussions; it should hold no surprises.

**Benefits of Performance Management**

*For employees, performance management provides an opportunity to:*

- Give employees continuous feedback on their performance
- Make sure they understand the supervisor’s expectations
• Learn how to improve deficiencies and get praise for their good work
• Seek to achieve results in meeting organizational goals and standards
• Identify strategies for working toward career goals
• Identify professional development opportunities

For supervisors, performance management provides an opportunity to:

• Establish a climate for success
• Build positive working relationships with employees
• Communicate expectations while reinforcing positive behavior
• Provide frequent coaching and feedback
• Document and assess employee strengths and weaknesses in order to plan and organize work accordingly
• Identify training needs
• Develop employee’s skills and abilities
• Recognize outstanding performance and manage poor performance
• Address problem areas and develop solutions to improve efficiency of unit as well as team

For AUBMC, performance management provides an opportunity to:

• Reinforce organizational values and foster a positive organizational culture
• Inspires employee commitment and improves employee satisfaction, morale and retention
• Maximize contributions of employees
• Establish accountability for supervisors and employees
• Identify high-potential employees- succession planning and promotions
• Promote organizational change and development
• Identify concerns or problems
Planning is a way of communicating performance expectations (standards and competencies) and goals to employees in order to direct their effort toward achieve organizational objectives. Getting employees involved in the planning process will help them understand the goals of the organization, what needs to be done, why it needs to be done, and how well it should be done.

- It describes the results that you should achieve as employee during the year.
- These results are expressed in terms of Goals, Standards and Competencies.

THE PERFORMANCE PLAN:

Configuring the first stage of Performance Management on BDI Focus system:

Step 1: Go to aub.bdifocus.com and log in using your AUB email and focus password

As a supervisor this is the screen that will appear for you:

Note that you have a tab called my staff.
Step 2: Click on my staff to see all employees directly reporting to you

Step 3: Left click on any employee reporting to you to start creating their performance plan

Notice the drop down list that appears when you click on the employee name. Choose performance plan from this list.
Step 4: Configuring the Performance Plan:

After you click on Performance Plan for the employee reporting to you this is the screen that you will see:

Note that goals, standards and competencies are initially empty

Next you will click on Add Individual Goal

Step 4.1: Setting and Monitoring Goals:

- Supervisor and employee work together to establish annual performance goals
- Review goals throughout the year for relevance, adjust as necessary
- Be SMART when setting goals:
  - Specific goals outline exactly what the organization hopes to accomplish
  - Measurable goals can be evaluated to determine whether they have been accomplished
  - Action-Oriented goals specify the actions you will take
  - Realistic goals are attainable but challenging
  - Time-Oriented goals have a specific amount of time in which to be accomplished

- Setting individual goals:
  - After you click on Add Individual Goal the following screen will come up:
Select Company Goal then click on Next Step

Next we will add Individual Goal that is LINKED to the Company Goal:

1. You have to input goal name
2. You have to input description of goal
3. You have to input a planned start date and planned completion date
4. Finally you will put success measures
Remember that individual goals should always tie to the Mission and Vision of AUBMC and the department.

The individual goals should fall under the umbrella of the organization to make sure that your efforts are aligned with the organization’s policies. The Company or Department goals are generated on the system, the individual goal you choose will have to be linked to one of them.

Samples of individual goals that are linked to organization goals:

- We will increase transfer admissions by 12% over last year
- We will conduct department meetings once per month with a published agenda so that employees can come prepared to offer input on meeting topics
- We will complete customer service training by April 15

Next you click on Add More Detail to put an appraisal weight on this goal
- After you click on Add More Detail please *Add Appraisal Weight* for the goal and change the *Status* if it has started.

- When you save it, it will automatically take you back to the performance plan page.

- Next you either *add more goals* or you can start *adding standards*. It is *preferable* to have at least two goals.

**Step 4.2: Adding Standards:**

- A performance standard describes, in measurable terms, the results that indicate that an employee in the position has properly performed the particular essential function. Standards tell us exactly how to tell that the essential function is done properly and it may include, but is not limited to, quality, quantity, timeliness, and documentation.
After you click on Add Standards, the standards associated with the job will show on the following screen:

1. Please choose between 5 – 7 standards
2. Next click on ADD and choose the next standard you want to add until you have chosen all the ones you want to include in the performance plan
After you have finished choosing the standards click on **FINISH**

This will take you to the screen where you have to put an appraisal weight for each standard.

1. Please insert a weight for each chosen standard.
Step 4.3: Adding Competencies:

- Competencies are skills that are essential to the performance of a position. The competencies you choose will be assessed and used for developmental purposes.

1. First click on Add Job Competencies

Next click on Add Competencies

Add/Remove Competencies

These competencies will be assessed. Performance Plans usually include goals and/or performance standards in addition to assessed competencies. If you want to identify important competencies for development purposes and not as a part of the performance appraisal, identify those in the development needs competencies section associated with each goal.

One or more job competencies are missing from this performance plan. To add all competencies associated with the employee position, select Add Job Competencies.
After you have finished removing the competencies that you do not want to include click on FINISH. This will take you to the Appraisal Page to place your weights for each competency selected.

This is the last step in configuring the Performance Plan. Next you will need to do this for every employee reporting to you.
Once the Performance Plan is completed, you will have one task pending: Performance Planning.

You will have to meet with your employee informing him/her of the performance plan for the coming fiscal year; the employee has the right to know of his/her objectives. Once the employee meeting takes place, click on employee meeting and finalize the task.

Throughout the year, anecdotes could be added by the employee or supervisor by clicking on the Add Notes tab:
For further assistance, please do not hesitate to contact us:

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