Current Trends in Employee Performance Evaluation

Rose K. Edmonds  
Sr. Director  
Talent Management  
Public Broadcasting Service  
rkedmonds@pbs.org

Carol Sorber  
Dir, Professional Development  
Public Broadcasting Service  
cssorber@pbs.org

Victoria Hagele  
HR and Business Manager  
Capital Public Radio  
victoria.hagele@capradio.org

Sherby C. Wilks  
Human Resources Officer  
WHRO  
sherby.wilks@whro.org
“I guess our Performance Appraisal system is a little bit ‘Old School’.”
A Brief History

- **1776** – **Adam Smith**, Father of Capitalism
  - “The Wealth of Nations”
  - Division of Labor, Specialization, Simple Tasks

- **1800s** – Factory Work
  - Child labor, 12-hr Days, Unsafe Conditions, Poor Wages, Rise of Unions

- **1900s** – **Frederick W. Taylor**, Father of Scientific Management
  - Work Design, Work Measurement, Production Control
  - Worker Satisfaction = Greater Worker Productivity

- **WWI** – US Military created merit-rating system to flag and dismiss poor performers

- **1927-32** – **Elton Mayo**, Father of Human Relations
  - The Hawthorn Studies measured relationship between productivity and the work environment

A Brief History

• 1929 – From The Great Depression came Pensions, Labor Standards, Minimum Wage

• 1940s – Management Style Evolved
  • Shift in treatment of employees; greater understanding of social needs of employees
  • Production improved as managers acted less like taskmasters and more like good leaders

• WWII – The Army devised forced ranking to ID enlisted soldiers with officer potential

• 1950 – Performance Rating Act established ratings for government employees: Outstanding, Satisfactory, Unsatisfactory

• Douglas McGregor (social psychologist) argued for engaging employees in assessments and goal-setting

• 1954 – Incentive Awards Act
  • Recognition/cash for superior accomplishments, suggestions, inventions, services, and other special acts
A Brief History

- 1960s – GE split appraisals into separate discussions about accountability and growth
- 1962 – Salary Reform Act
  - Pay for Performance
- 1970s – Aubrey Daniels
  - Coins the term “Performance Management”
  - The technology for managing both behavior and results
- 1980s – Management by Objectives
  - Managers & employees work together to set goals and timelines
  - Jack Welch championed forced ranking at GE
- 1992 – Bricker Survey
  - 20% of companies were “Very Satisfied” with their performance review process.
- 1997 – SHRM Survey
  - Only 5% of companies were “Very Satisfied”
Brief History - Performance Review

• 2000s – Information Age
  • Performance Management goes online with positive & negative results
  • Organizations got flatter, increasing the number of direct reports for managers
  • Remote workers on the rise

• 2008 – Prof. Samuel Culbert wrote “Get Rid of the Performance Review!”

• 2009 – Reuters: 4:5 US works are dissatisfied with performance reviews
A Brief History

• 2010s – The end of traditional performance reviews?
  • 2011 – Kelly Services dropped appraisals for frequent, informal feedback
  • 2012 – Adobe ended annual performance reviews per “Agile Manifesto”

• 2016 – Performance Ratings Come Full Circle
  • Deloitte, PwC, and others that went numberless are reinstating performance ratings, but using more than one number and focusing on developmental feedback
What are the key features of your process?
In consultation with Supervisor, Employee completes “Plan of Work: Goals & Objectives Form;” the form is sent electronically to HR.

Periodically (and at least mid-way through the period), Supervisor reviews performance with Employee, including revision of Goals and Objectives as necessary.

Supervisor scores the Key Elements section and the total score is the Final Performance Review Rating.

Employees are encouraged to complete professional development goals before the face to face review meeting.

During performance meeting, Supervisor and Employee walk through the sections and answer any questions or concerns; complete comments section.

Following the Signature of the Employee and Supervisor, the form is signed by the Department head and forwarded to HR.
Before the Goal Setting Meeting
• Employees complete PERSONAL EXPECTATIONS form
• Manager completes GOALS & PRIORITIES SETTING (“GPS”) form

At the Goal Setting Meeting
• Review of prior year’s goals; discuss outcomes and learnings; provide feedback; document employee achievements or/and shortcomings
• Discuss new goals and key result indicators
• Determine frequency of check-in meetings and schedule the next one

At Check-In Meetings
• Review goals and comment on progress; give and receive feedback; provide coaching if necessary
• Complete MEETING FINDINGS and OUTCOME AND LEARNINGS on GPS

After Check-In Meetings
• Provide the completed form to HR
• Repeat cycle

*The GPS form is a living document shared by managers and employees; they are asked to consider using a shared document on Google docs*
PBS

Current Process
• Employees create goals at the start of the fiscal year (Summer 2016) and review with their managers.
• Employees enter approved goals into Workday and can map them to either a Corporate Area goal, PBS Metric or PBS Strategic Pillar.
• Annual Performance Reviews launch in June 2017.
  o Employee provide updates on their goals overall performance in Workday.
  o Manager then provide their comments in Workday. PBS is not currently using performance ratings.
  o Once complete the performance conversation can take place.

It’s Been an Evolution
• 2014 – Paper-based annual reviews transitioned to the Workday HRIS
• 2015 – Performance Ratings revised with updated titles, and definitions
• 2016 – Performance Ratings eliminated and Continuous Feedback Pilot
• 2017 – At least one more Annual Review, decision point on shifting organization to Continuous Feedback
How long have you been evolving the process?
What lessons have you learned along the way?
What are you doing to motivate and inspire your staff to start, continue, and complete the process?
Talk about the training you’re doing with managers and employees to help them understand the process.
What are your employees and managers saying about the process?
What is unique about your process?

What would you encourage other organizations to adopt?
Did you read or study to prepare to revise your employee performance evaluation process?
What advice do you have for organizations contemplating a change?

What’s the one thing folks should take away from this session?
Reading List

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