HOUSTON EMPLOYEE ASSESSMENT & REVIEW

HEAR TRAINER ORIENTATION

AGENDA

- **Introduction & Housekeeping** (Sign-in, Material, Restrooms, etc.)
- **Welcome** (O. Reid)
- **Task Team Overview, EPE-to-HEAR Change Management** (J. McCown, R. Duplessis, P. Smith)
- **PMSI Project Overview & Team Intro.** (N. Pinnock)
- **HEAR Training Plan & Training Team Intro** (C. Jackson)
- **HEAR Training Logistics (Scheduling, Locations, Materials, etc.)** (M. Perry)
- **Next Steps & Check Lists** (N. Pinnock)
- **Questions and Answers** (TEAM)
- **Lunch & Dismissal** (All)

WELCOME

Omar C. Reid

Human Resources Director & Executive HEAR Project Sponsor

TASK TEAM OVERVIEW…

Janet McCown

HEAR Business Process Owner

Robbin Duplessis

HEAR Subject Matter Expert

Patricia “Pat” Smith

HEAR Training Expert

2011 MEET AND CONFER

Per Article 12.02 – EMPLOYEE EVALUATION (p. 44)

- **ESTABLISHED TASK TEAM TO ANALYZE EFFECTIVENESS OF EPE SYSTEM**
  - Three Union Representatives
  - Three City Representatives
  - Three Non-City Human Resource Professionals

- **PROVIDED A REPORT TO LABOR MANAGEMENT COOPERATION COUNCIL (LMCC)**
  - Strengths and Weaknesses of Existing EPE System
  - Recommend Improvements and Alternatives
    - "Fair, equitable and effective"

GUIDING PRINCIPLES

1. A tool to establish performance expectations and developmental opportunities

2. Aligned with strategic, business plans, balanced scorecard

3. Strive for SMART measurements

GUIDING PRINCIPLES – CONT'D

4. Process should promote ongoing feedback and communication of performance

5. Keep it simple

- Involve/engage employees
- Include feedback from peers, customers, and internal stakeholders
- Positive experience

AP 3-20 & HEAR GUIDELINES

HEAR
HOUSTON EMPLOYEE ASSESSMENT AND REVIEW

2012

A COMPREHENSIVE GUIDELINE FOR SUPERVISORS AND MANAGERS

CITY OF HOUSTON TEXAS

OBJECTIVES OF AP 3-20

To support a culture of high performance facilitated by the HEAR process founded on the following core elements:

- **SMART** employee performance goals aligned with City/department/division strategic goals;
- ***Assurance of fairness and objectivity through the training of supervisors and managers;***
- Simple and short forms identifying the core goals and behaviors to be achieved;
- Regular communication with employees (quarterly/semi-annual) to recognize, motivate or provide opportunities to improve; and
- Growth and development opportunities.

OBJECTIVES OF GUIDELINES

The guidelines are supplemental to Administrative Procedure 3-20 (AP 3-20), and contain the following:

- **Explanation of the core elements of the HEAR process, general requirements, key considerations for a successful assessment, roles and responsibilities, and assessment schedule.**

- **Major steps of the process, which include:**

  - familiarizing the employee with the HEAR process;
  - preparing the documentation associated with the process;
  - procedures for conducting the work progress meeting; and
  - recommendations on how to complete the HEAR process.

- **Appendices containing the documents used to administer the HEAR process.**

Performance Management System Execution Deployment Roadmap

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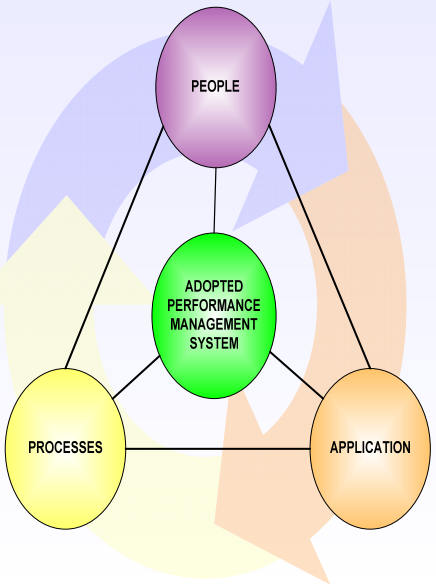

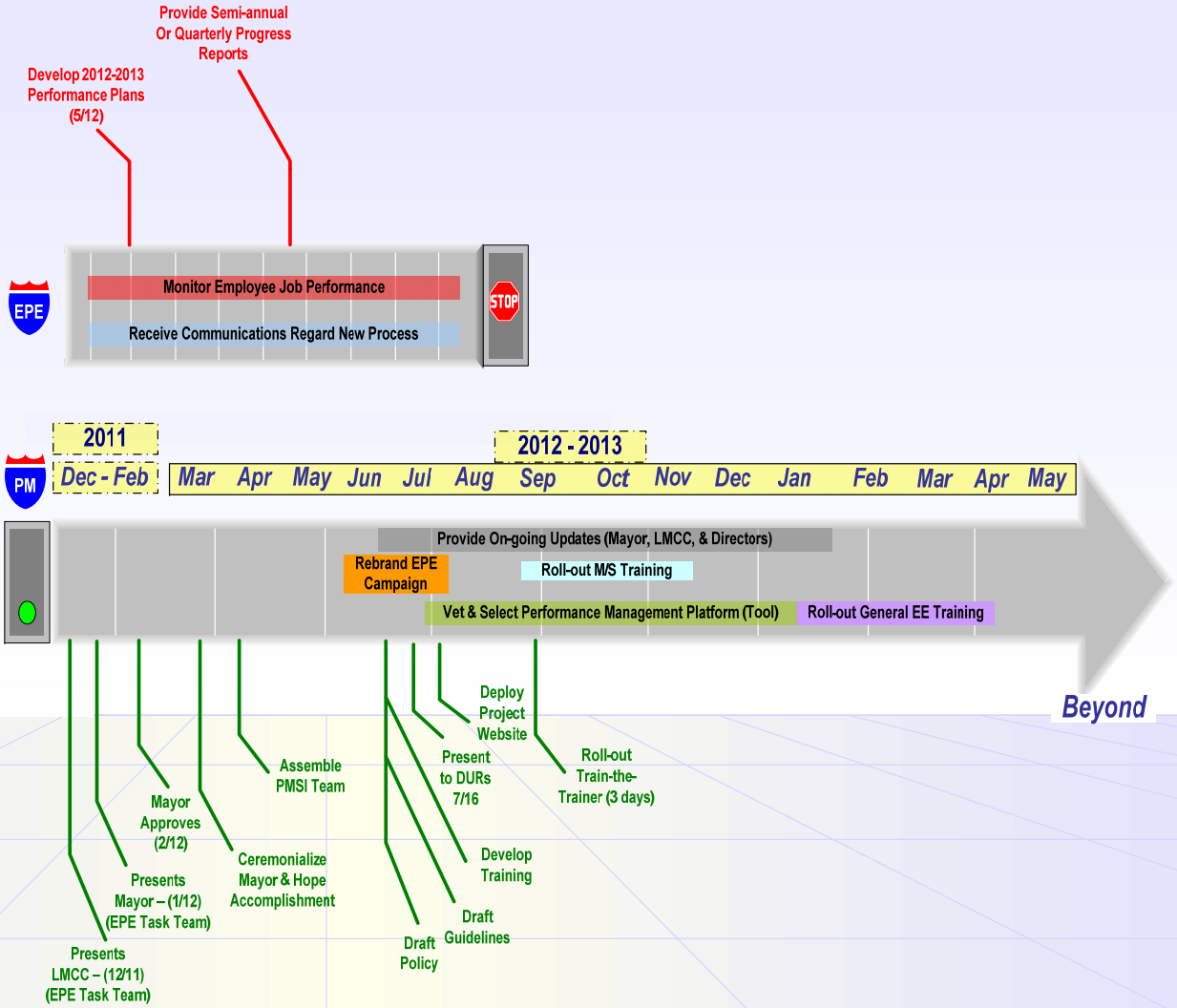

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PMSI PROJECT OVERVIEW

Noel A. Pinnock

HEAR Project Manager

Organizational Development Critical Success Landscape & Vision

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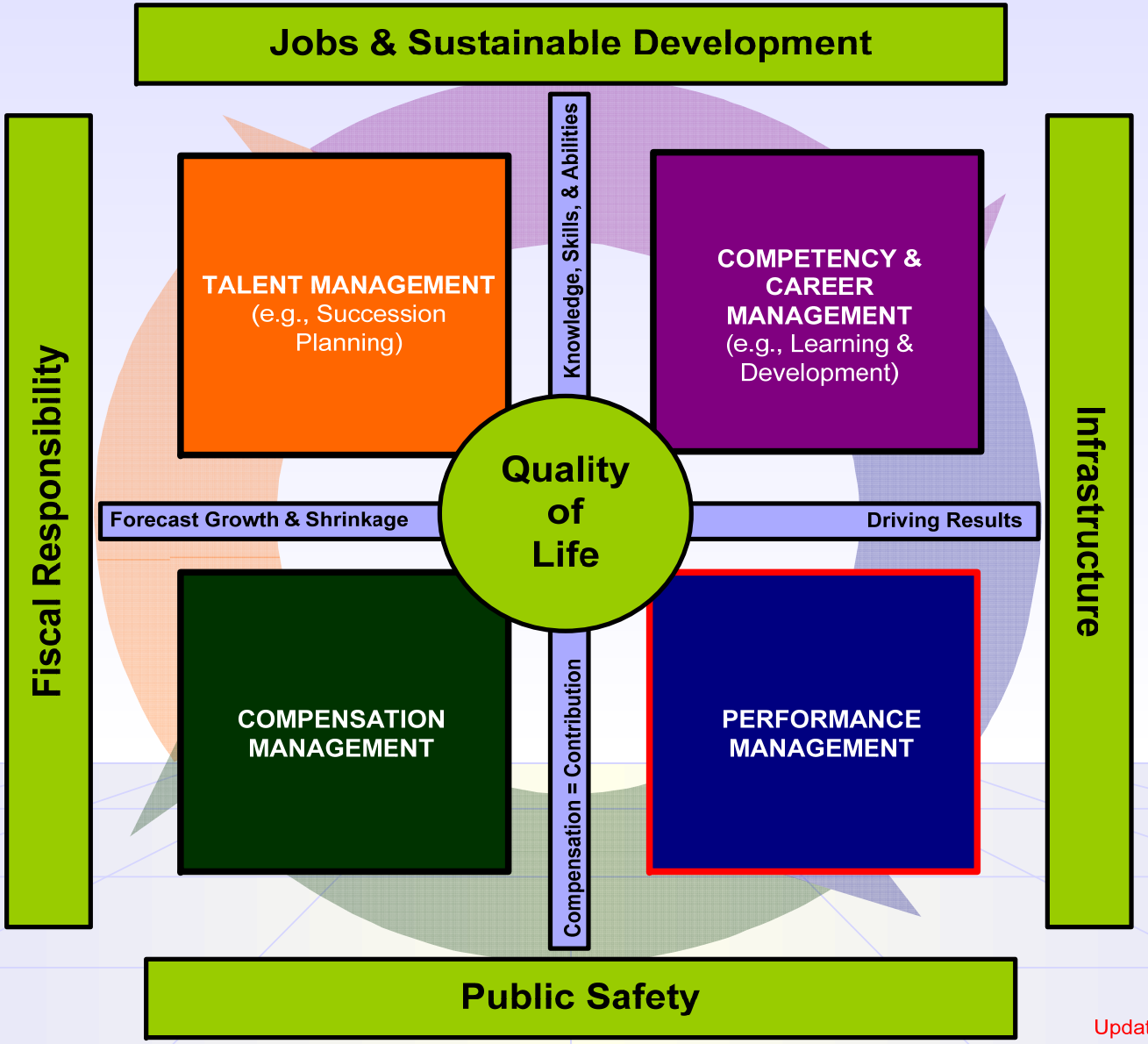

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The vision of organizational and workforce development is to develop a world-class workforce that is equitably compensated and secure in its future.

Performance Management System Implementation – What Does HEAR Success Look Like?

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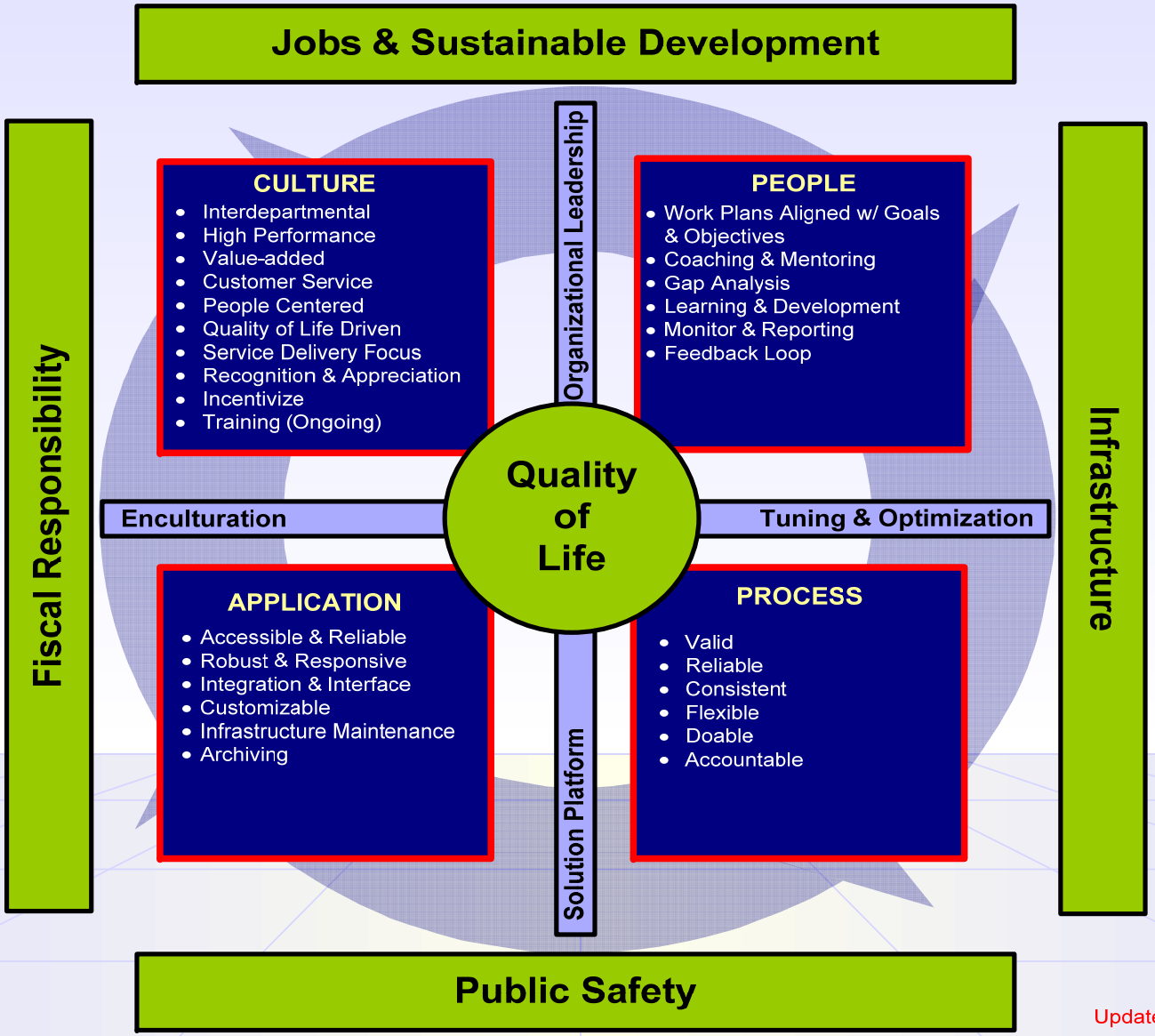

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The mission of the **Performance Management System Project Team** is to **implement** a citywide performance management **process** and **application** across all departments in collaboration with city stakeholders and internal customers, addressing its impact on **workforce productivity**, **efficiency**, and **service delivery**.

VISION

The vision for this project is to deploy a Performance Management (PM) System that will:

- **Educate** employees on the new process and future application;
- **Establish** SMART performance measures, expectations and developmental opportunities;
- **Align** performance plans with departmental strategic goals and objectives;
- **Promote** ongoing feedback between the employee and supervisor; and
- **Keep** the PM process simple and positive.

GOALS

- **Goal 1 – Improve employee performance**
  - **Objective 1**: Improve information related to EE performance
  - **Objective 2**: Improve communications between EE and supervisor
  - **Objective 3**: Increase interaction (coaching) between EE and supervisor
- **Goal 2 – Improve management efficiency**
  - **Objective 1**: Re-engineer business processes
  - **Objective 2**: Ensure citywide adoption and utilization of the new performance management system
- **Goal 3 – Create a positive City culture**
  - **Objective 1**: Provide timely communication throughout the project lifecycle
  - **Objective 2**: Deliver effective training to all stakeholders
  - **Objective 3**: Respond to employees questions and concerns

"If you think you can or you can't, then you are right!"
Henry Ford

COMMUNICATION

The only thing that keeps you from losing
the slight amount of job satisfaction you do have
is the fact that you don't really know what is going on.

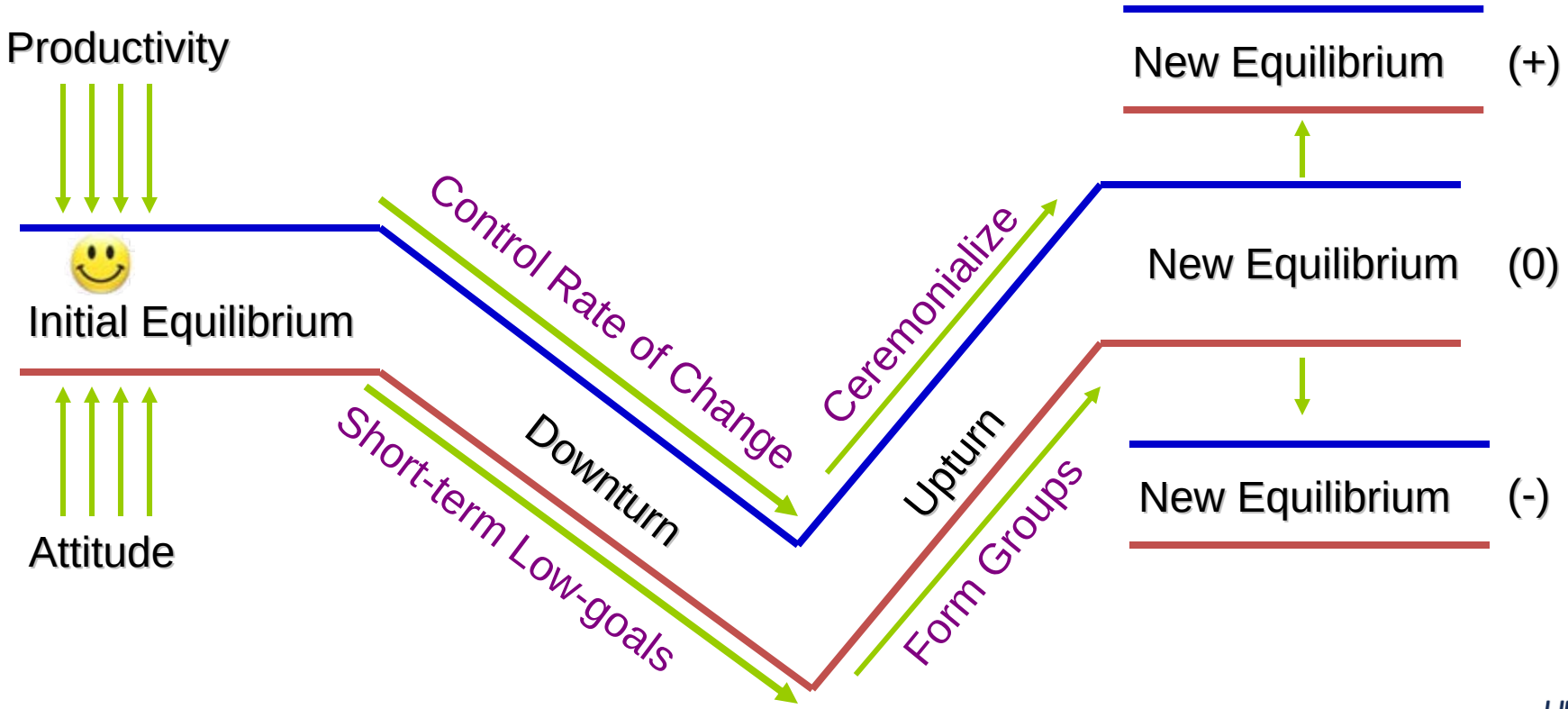
SlapFish.com 'A Slap in the Face With a Wet Fish'

CHANGE

"Change is the essence of life. Be willing to surrender what you are, for what you could become".

"V" IMPACT OF CHANGE

Change Curve measures the "V" impact on related productivity and/or attitude, which usually follows the implementation of change



Performance Management System Implementation Organization Chart

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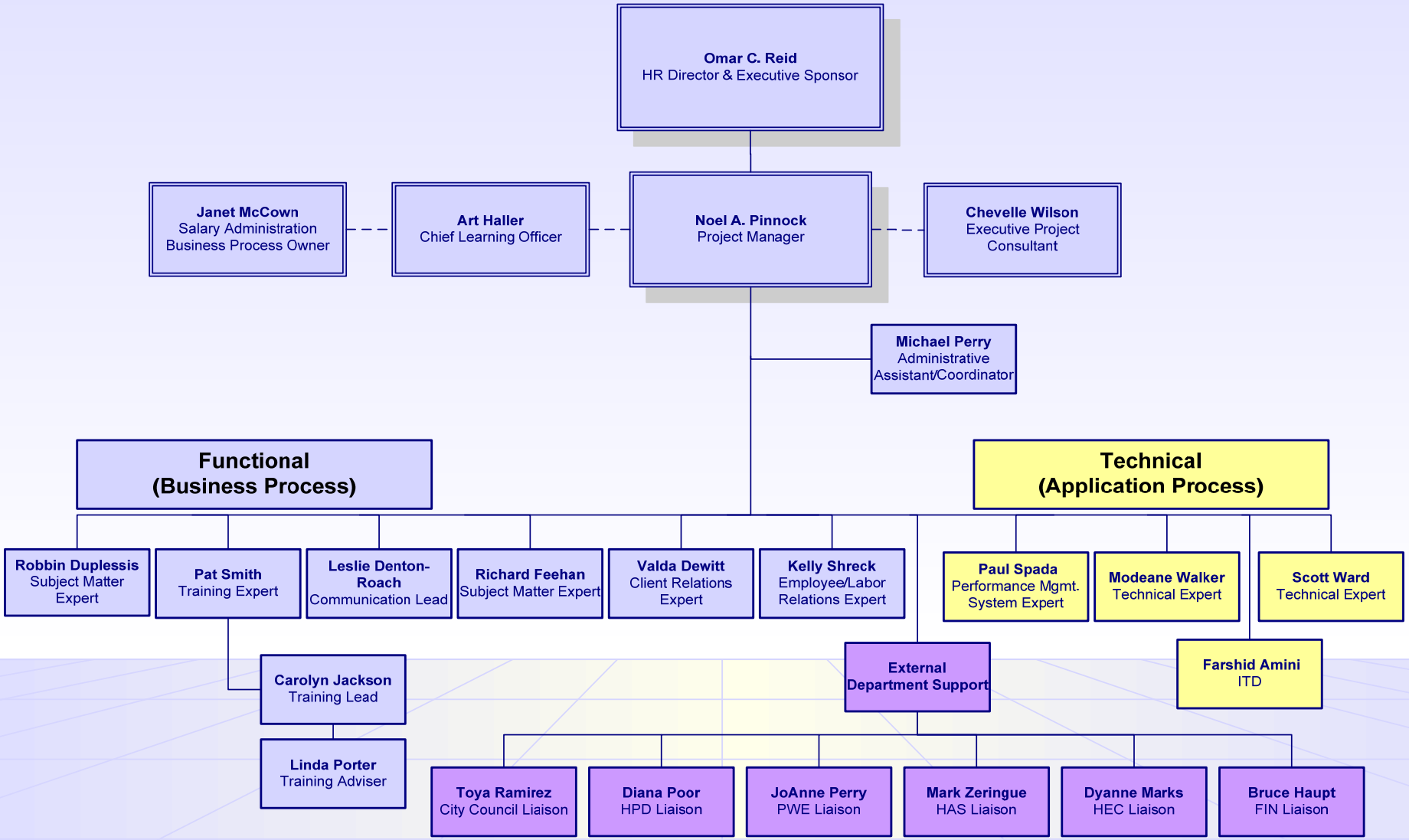

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Back Row – Omar C. Reid, HR Director; Noel A. Pinnock, Project Manager; Dyanne Marks, HEC Liaison; Modeane Walker, Technical Expert; Farshid Amini, ITD Liaison; Scott Ward, Technical Expert

Middle Row – Toya Ramirez, CNL Liaison; Linda Porter, Training Adviser; Leslie Denton-Roach, Communication Lead; Janet McCown, Business Process Owner

Front Row – Richard Feehan, Subject Matter Expert; Valda DeWitt, Client Relations Expert; Robbin Duplessis, Subject Matter Expert; Carolyn Jackson, Training Lead; Patricia Smith, Training Expert; Chevelle Wilson; HRIS Liaison

Not Shown – Kurt Amend, FIN Liaison; Diana Poor, HPD Liaison; Art Haller, E.B. Cape Center Chief Learning Officer; Kelly Shreck, Employee/Labor Relations Expert

15 - MINUTE

HEAR TRAINER (TTT)

Carolyn Jackson

HEAR Training Lead

TRAINING PLAN

- **Hours:** 8:30 a.m. – 4:30 p.m.
- **Days:** Tues., Weds., and Thurs.
- **Months:** October – December 2012 (Thanksgiving & Christmas weeks off)
- **TTT Workshop**
  - Ground rules
  - **Parking lot**
  - All material provided
  - The KISS Principle … (Keep It Short and Simple)
  - The HEAR & Now – A "HEAR vs. EPE" Approach
    - **STOP Doing; START Doing; CONTINUE Doing**

EPE vs. HEAR

- ACTIONS to **STOP** Doing
  - Referring to the COH performance management process as the **Employee Performance Evaluation** system
  - Calling the system **EPE**

- ACTIONS to **START** Doing
  - Referring to the process as the **Houston Employee Assessment and Review**
  - Calling the process **"HEAR"**

- ACTIONS to **CONTINUE** Doing
  - Managing employee performance
  - Conducting reviews

OFFICIAL FAMILIARIZATION TRAINING WORKSHOP

- **SMART Goals**
  - Experiential activities – actual goals from dept.
  - Video

- **Three C's and Three F's of Communication**
  - Coordination
  - Coaching
  - Collaboration
  - Feedback
  - Follow-up
  - Follow-through

  - Role Playing
  - Case Studies

HEAR
HOUSTON EMPLOYEE ASSESSMENT AND REVIEW

TRAINING LOGISTICS

Michael Perry

HEAR Project Coordinator

LOGISTICS

- **The HEAR Trainer Charge** (Director Selected)
- **Facilities** (HAS, PWE, HPD, HEC, & HFD)
- **Supplies**
- **Classroom Copies** (5 sets)
- **Registration & Sign-in Procedures**
- **Tardy Guideline** (15 minutes)
- **Materials** (Download, Print, & Tote)
- **HEAR Trainer Pairs**
- **Single Point of Contact** (SPOC)
- ***Kronos*** *(Gina Goosby-Harris)*

next
steps
next
steps
next
steps

REQUIRED NEXT STEPS

- **Complete the HEAR Process WBT**
- **Attend a HEAR Train-the-Trainer offering** (10/1, 2, or 3, 2012)
- **Participate in a "live" HEAR Process training at the E.B. Cape Center**
- **Meet with your HEAR trainer cohort**
- **Make adjustments to work schedules as required**
- **Execute as planned (consistency in messaging)**
- **Work with the HEAR Project Coordinator to manage enrollment, receive sign-in sheets** (electronically) **and submit completed sign-in sheets** (inter-office mail 24 hrs following the completion)
- **Forward "parking lot" questions to** michael.perry@houstontx.gov

QUESTIONS & ANSWERS

Food Brought To You By:

Pause for Dismissal Instructions

HEAR IS SIGNED, SEALED, & DELIVERED!