

The TMG Achievement Program: **Annual Objectives and Development Goals** for TMG

Instructions

These instructions describe the TMG Achievement Program for Annual Objectives and Development Goals. The instructions outline process to be followed if you are completing the paper-based Annual Objectives and Development Goals for TMG.

If you are participating in the ePerformance pilot, separate instructions describing the use of the ePerformance tool in Mosaic are available.

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The TMG Achievement Program: Annual Objectives and Development Goals for TMG

Introduction:

Completion of the annual objectives and development goals for TMG is important for a number of reasons including understanding of work objectives, engagement, career success and deciding pay increases as part of the Annual Salary Review for TMG.

Performance Review Tools:

Performance Review Tools are available in either paper-based forms or through the ePerformance module in Mosaic.

OPTION 1: Paper-Based Forms

A new paper-based form has been created to align with the new TMG Achievement program and is available here: <http://www.workingatmcmaster.ca/link.php?link=comp:total-rewards-performancegmt>

OPTION 2: ePerformance Module

Within Mosaic, there is a performance management module entitled 'ePerformance'. Participants already using the module recorded their performance and development goals for the 2016/2017 year in the system and will use the module to complete the 2016/2017 performance assessments by documenting progress achieved towards the goals that were established last year. An overall achievement rating will be assigned by the supervisor using the new levels of achievement in the TMG Achievement program. Individuals will then input their 2017/18 annual goals and objectives into ePerformance.

Note that it is expected that ePerformance will be in place for all TMG in July 2018 beginning with the confirmation of performance goals and development plans for the 2018/2019 year.

For more information about ePerformance, please contact the Organizational Development team in Human Resources Services OR visit Mosaic and on the Home page, click on the Support and Documentation tile, then the How-to Guides tile, and scroll down to “HR ePerformance” to access various guides.

In prior years, there were two versions of the performance review form available. The first was for TMG that managed people and/or projects. The second was an alternate version that could be used for confidential staff. With the introduction of the new TMG Achievement Program, the Annual Objectives and Development Goals form is to be used for all TMG. The confidential form is no longer available.

Annual Objectives and Development Goals for TMG:

Annual Objective and Development Goals setting provides an opportunity for collaborative discussion between an employee and their manager to assist in clarifying overall expectations, ensure alignment to team, department and University goals, as well as gain individual commitment and engagement.

Goals conversations and documentation should be completed at the beginning of each salary year (which runs from July to June) to confirm the priority items to be achieved.

Within the form, information and progress updates can be captured throughout the year for:

- **Work Objectives:** to highlight key strategic, operational or role priorities. (We recommend a guideline of 4-6 goals, however, this may be flexible depending on the nature of your role.
- **Leadership Capabilities:** to review how you are leveraging these capabilities to conduct your work and achieve Annual Goals
- **Development Goals:** to capture opportunities for personal and professional growth, training and experiential learning to cultivate potential and build capability
- **Overall Achievement Summary:** in consideration of the above components leading to an overall achievement summary and rating.

Planning your Annual Goals:

This form is to be completed by employees for review and discussion of key priorities with their supervisor prior to finalizing their Annual Goals for the year.

The form allows you to describe: work objectives; leadership capabilities; individual development; overall achievement summary

Work Objectives:

As a Best Practice, it is recommended that 4-6 Annual Work Objectives are listed with supporting details including:

- a. Description – what is expected to be accomplished over the course of the year
- b. Action Plan – the steps that will be taken to accomplish the goal
- c. Key Measures and Outcomes – a description of what success looks like
- d. Results – what was achieved

Leadership Capabilities:

McMaster's core leadership capabilities are summarized in the form. When completing the year end review, provide specific examples of how the leadership capabilities have been applied.

Development Goals:

Employees should consider the skills, knowledge and capabilities that are required to successfully fulfill their key job functions, and plan for the specific development activities and training that will enable personal and professional growth for current and future roles.

In the development goals section, summarize the following:

- a. Description – what is expected to be accomplished over the course of the year
- b. Action Plan – the steps that will be taken to accomplish the goal
- c. Key Measures and Outcomes – a description of what success looks like
- d. Results – what was achieved

The primary responsibility for creating and implementing the development plan rests with the employee, working closely with their supervisor to create an Individual Development Plan, which provides a structure and assists in tracking related activities. Goals will be tailored depending on the nature of your role, identified opportunities for growth and career interests. This could include a combination of formal and informal training, experiential learning, self-directed learning, and relationship building (i.e. mentoring, coaching, networking, community involvement).

Overall Achievement Summary:

The supervisor should provide an assessment and comments on the employee's overall achievement in consideration of the achievement of work objectives, leadership capabilities and individual development and should indicate the overall rating assessment on the first page of the form. Employees are encouraged to add their comments that reflect on their overall achievement and goals.

Goals should be reviewed and/or updated when an employee is heading onto or returning from a leave, undergoes a significant role structure change or takes on a new role within the University.

The completed Performance Review form is to be submitted to Human Resources Services. **Merit increases will not be processed without a fully completed Performance Review form.**

The Annual Objective Setting document for the coming year should also be submitted to Human Resources Services.

Alignment with Organizational Strategy and University Goals:

Annual Goals should be created in alignment with our overall University strategy related to Forward with Integrity: Learner Experience, Community Involvement, Research and Internationalization, as well as Department and Team level strategic and operational goals.

The goals for the President and Vice-Presidents are centered on initiatives relating to *Forward with Integrity*, including enhancing the student experience, developing strategies on research and internationalization, building community partnerships and providing support to the academic mission via fundraising, advocacy and through flexible and integrated administrative processes. A summary of the goals of the President and Vice-Presidents are posted each year.

In developing individual goals for the coming year with your TMG employees, you are encouraged to consider how the University's mission and vision, the strategic mandate statement, and current organizational goals and priorities may be incorporated. The documents referenced in this section are located on the President's website:

- <http://www.mcmaster.ca/presidentsoffice/mission.html>
- <http://www.mcmaster.ca/presidentsoffice/about/accountability.html>
- <http://www.mcmaster.ca/vpacademic/documents/SMA-McMaster-December2013.pdf>

The TMG Achievement Program:

The TMG Achievement Program is our updated performance review and development planning program for members of TMG.

A key feature of the TMG Achievement Program are the new achievement levels and definitions of rating. A copy of the TMG Achievement program follows on the next page. The key features of the program and the definitions of the ratings are provided.

An overall rating will be assigned at the end of the salary review year based on the TMG Achievement Program. While not specifically prescribed, in determining the overall rating, the manager will want to consider, in light of the type of TMG role, the appropriate balance and weighting of the work objectives with that of the leadership capabilities and individual development.

The TMG Achievement Program was announced in October 2016. Beginning in Spring 2017, members of TMG will be assessed and given a performance rating as outlined in the new TMG Achievement Program.

TMG Achievement Program

Key features:

- Considers achievement of work objectives, leadership capabilities, and individual development and results in an overall rating.
- Promotes and recognizes excellence of our TMG leaders.
- Supports and encourages a culture of high performance, growth of leadership capabilities and potential, and ongoing individual development.
- Achievement objectives and expectations are tied to the University's mission, vision, values and strategic direction.
- Encourages engagement in behaviours and achievement of results that facilitate meeting University and departmental objectives.
- Encourages use of evidence-based assessments.
- Provides a clear and understandable framework describing levels of achievement.
- Supports our pay for performance philosophy and is an integral component in our merit allocation program.

Achievement Levels and Definitions:

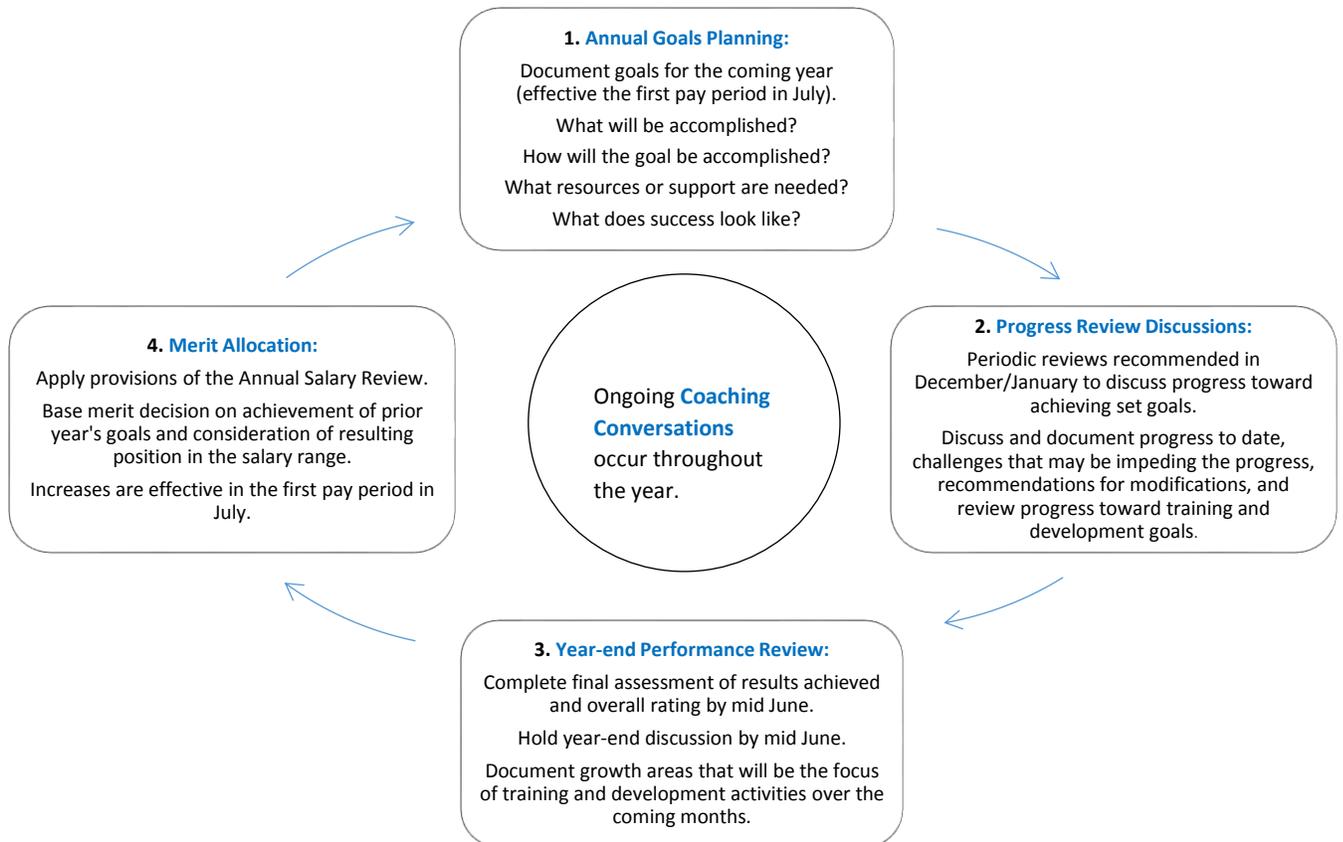
The TMG Achievement Program recognizes three levels of achievement, as described in the table below. Using these descriptions, supervisors will be able to articulate to employees at all levels what it takes to achieve excellence, to accomplish major goals, and to make unique contributions worthy of the highest level ratings. Achievement level descriptions relate to work objectives, leadership capabilities and individual development and one rating reflective of overall achievement is to be assigned.

Achievement Levels and Definitions of the Overall Rating			
	Achieving	Successful	Outstanding
Overall	Achievements are stronger in some aspects of the job than others. Proficiently delivers core functions of the role with opportunities to improve overall consistency and approach. Demonstrates some leadership behaviours in support of the university's strategy. Contributes to the achievement of departmental objectives.	Achievements meet and occasionally exceed expectations and requirements of the role. Consistently performs in a thoroughly proficient manner. Demonstrates effective leadership behaviours to enable and support the university's strategy. Positively contributes to the achievement of departmental objectives.	Achievements consistently exceed expectations. Makes outstanding contributions which maximize impact and influence beyond the scope of the role. Models exceptional leadership behaviours which enable and support the university's strategy. Significantly contributes to the achievement and advancement of departmental objectives.

Achievement Levels and Definitions of the Components that are to be Factored in to the Overall Rating			
	Achieving	Successful	Outstanding
Work Objectives	Meets the majority of expectations through demonstrated effort and utilization of their knowledge, skills and abilities. Growth in some areas is required.	Consistently achieves and occasionally exceeds work objectives and departmental goals through concerted efforts with results that add value and benefit the faculty, department and/or university.	Significantly and consistently exceeds expectations of work objectives and goals by producing a high quality and quantity of work that add value and consistently benefits the faculty, department and/or university.
Leadership Capabilities	Demonstrates some of the leadership capabilities identified for the incumbent's leadership level and exhibits many behaviours that align with the values and qualities of the university.	Demonstrates all leadership capabilities identified for the incumbent's leadership level and exhibits positive behaviours.	Excels at all leadership capabilities identified for the incumbent's leadership level and is seen as a model of exceptional leadership behaviour.
Individual Development	Requires improvement in being open to constructive feedback and seeking out opportunities for development.	Openly receives constructive feedback and takes advantage of opportunities for improvement and development.	Consistently seeks out constructive feedback and proactively engages in opportunities for improvement and development.

Annual Goal Setting and Performance Review Cycle:

It's important to think of the performance review and development planning program for TMG as a year-round consideration. The chart below outlines the performance management cycle. Supervisors and TMG employees collaborate to set goals at the beginning of each salary year, conduct periodic reviews to assess and, if required, realign goals, followed by supervisors making merit allocation decisions based upon a formal assessment of their employee's attainment of goals. Ongoing coaching conversations throughout the year are encouraged.



The outcomes of this dialogue will assist you in identifying the skills or capability requirements within your team. It will naturally lead into conversations around personal and professional development and will help to identify the types of activities that will assist in building employee and organizational capability (i.e., project work, coaching, mentoring, networking, and training).

All supervisors of TMG members are encouraged to have an open dialogue with their team members regarding professional and career development. The Individual Development Plan (IDP) will support this conversation and provide a framework with which to create focused learning objectives and establish a strategic development plan to enhance job skills, enrich current roles and develop for future positions:

<http://www.workingatmcmaster.ca/link.php?link=OD:experienced-leaders>

Reviewing Leadership Capabilities

At McMaster we believe in the ongoing cultivation of human potential, leveraging the diverse talents of our employees and by recognizing everyone has the opportunity to be a leader in their own role.

Our new Leadership Capabilities matrix incorporates core leadership behaviours for all leadership levels. Supporting resources for each level can be found on <http://employee careers.mcmaster.ca/category/development/>

To assist in identifying opportunities for development and in reviewing the employee's achievement for the year, managers/supervisors in discussion with their employee will determine whether there is clear, demonstrable evidence of success according to any outlined measures or indicators, describing that success with concrete and specific examples, and analyzing the extent to which the employee succeeded.

The following will be taken under consideration:

- >Where there is demonstrable evidence of success, identify examples and analyze the extent to which the employee succeeded
- >Where there is little or no evidence of success, identify examples and analyze the extent to which the employee did not succeed
- >Identify examples and analyze how often the employee demonstrated effective behaviours for their leadership level
- >Identify examples that illustrate whether the employee demonstrated the appropriate degree of proficiency for each capability

McMASTER'S CORE LEADERSHIP CAPABILITIES



<h3>Takes a Strategic Approach</h3> <ul style="list-style-type: none">• Promotes McMaster culture and values• Understands global trends and impact• Anticipates challenges, risks and outcomes• Gathers key information and resources• Enables strategic plans through role	<h3>Communicates & Collaborates</h3> <ul style="list-style-type: none">• Identifies opportunities to collaborate with others• Generates trust and an inclusive environment• Listens with insight and respect• Leverages internal and community networks• Provides meaningful recognition	<h3>Drives Results</h3> <ul style="list-style-type: none">• Advances the University strategy• Delivers with integrity• Balances priorities to achieve success• Accepts responsibility and accountability for results• Takes prudent risks which enable innovation• Operates with fiscal responsibility	<h3>Champions Change & Innovation</h3> <ul style="list-style-type: none">• Acts as a positive change agent• Illustrates resilience and adaptability• Is bold in championing innovations• Identifies and fosters opportunities for continuous improvement• Seeks and utilizes feedback	<h3>Develops People</h3> <ul style="list-style-type: none">• Engages in personal, team and leader development• Celebrates and promotes diversity• Actions learning to enhance value of work• Inspires others using a coach approach• Provides balanced and timely feedback	<h3>Invests in Relationships</h3> <ul style="list-style-type: none">• Enhances the university brand, reputation and financial success• Builds relationships using a service model approach• Creates positive student, employee and partner experiences• Participates actively in community engagement• Demonstrates creativity in resolving issues
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Helpful Resources

The performance review tools are available for download on the Total Rewards webpage:

<http://www.workingatmcmaster.ca/link.php?link=comp:total-rewards-performancemgmt>

McMaster Leadership Capabilities supporting resources for each leadership level can be found on:

<http://employeecareers.mcmaster.ca/category/development/>

Development Planning supporting resources can be found on:

<https://employeecareers.mcmaster.ca/category/development/>

(Navigate to 'Building Leadership Capability' and select an appropriate leader level.)

Information regarding the University's mission and vision, the strategic mandate statement, and current organizational goals and priorities are located on here:

<https://president.mcmaster.ca/mission-and-vision/>

<http://www.mcmaster.ca/vpacademic/priorities.html>

<https://president.mcmaster.ca/about-the-president/accountability/>