

Achieve Together Performance Program

achieve
together



PEOPLE & ORGANIZATION DEVELOPMENT
HOW DO YOU WANT TO **GROW** TODAY?

Agenda



This program will cover:

- What the Achieve Together Performance Program is
- The goals, features, and process of the performance program
- Ongoing check-in conversations
- Communicating goals effectively
- Achievement criteria, performance levels, feedback and performance improvement
- Using the six achievement questions for discussing performance and documenting the conversation
- Locating Achieve Together knowledge base, resources, and support contacts

Managers with Represented Staff & Academic Employees

- Achieve Together – performance program for non-represented staff career and contract employees only
- This **does not apply** to represented staff and academic (non-represented and represented) employees

Achieve Together Program

Achieve Together Program Key Points

Achieve Together Check-ins Program

Check-ins conducted every 4 months; regular goal and expectation setting occurs through an open, collaborative process

Feedback exchanged and incorporated into ongoing check-ins

Individual goals tied to organizational, departmental, and group priorities

Check-ins focused on goals, job mastery, inclusion/belonging, collaboration, and innovation

Managers focused on coaching and developing people

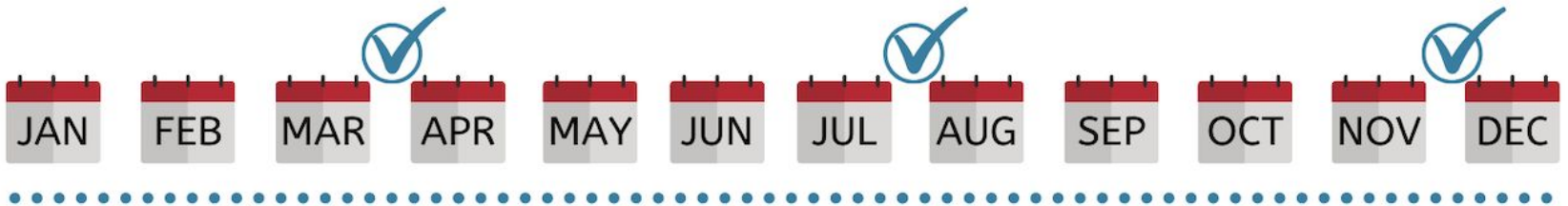
Process is aligned with day-to-day work, agile, and ongoing

Performance program aligned with merit cycle. Merit rewards paid on time! Not retroactive.

Check-in Period Schedule

Check-in Period Name	Timeframe Covered	Hold Check-in Conversation During 1on1 Between	Documentation Due Date
Spring/Summer	Apr 1 - Jul 31	August 1 - September 15	September 15*
Fall	Aug 1 - Nov 30	December 1 - January 15	January 15*
Winter	Dec 1 - Mar 31	April 1 - May 31	May 31*

* or next business day



Check-in

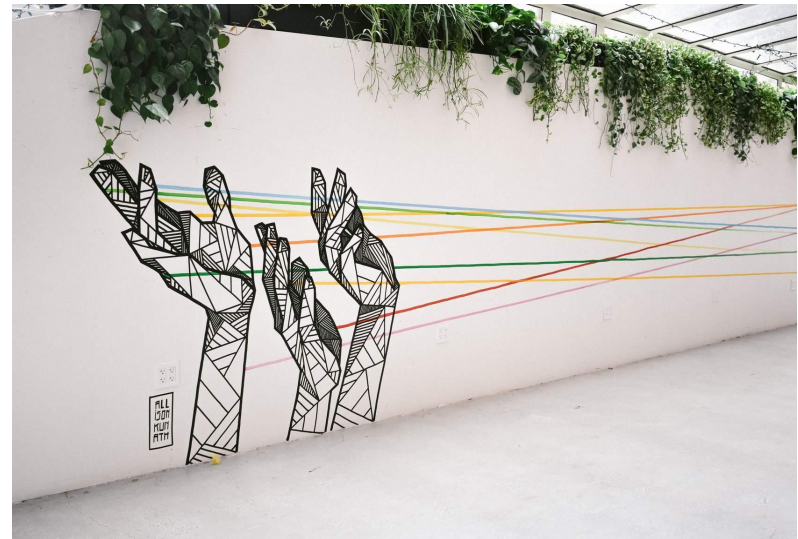


Ongoing 1on1s & feedback

Aligned Goal Setting

Goals Methodology

- Clear and unambiguous
- Time bound
- Tied to organizational, departmental, & group goals/priorities



SMART Criteria



- **Specific**
 - Clear and unambiguous
 - Actions to be completed
- **Measurable**
 - Criteria for accessing progress and successful completion
- **Attainable**
 - Can be accomplished – a stretch, but possible
- **Relevant**
 - Supports the department/unit goals
- **Time-bound**
 - Fixed duration with a starting and ending point

SMART Objective Example

Unit Goal:

Increase customer satisfaction of campus constituents

Employee SMART Objective:

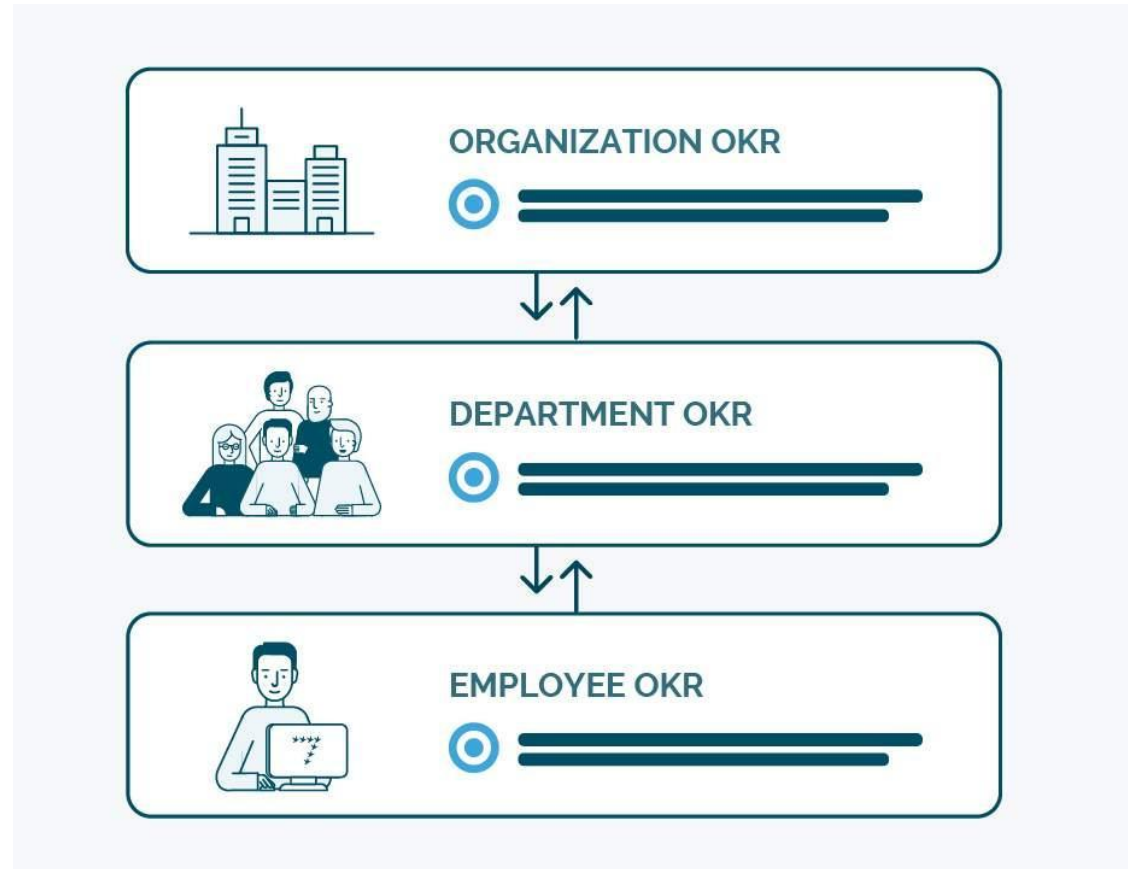
Employee customer service rating will meet or exceed 85% satisfaction for fiscal year ending June 30, 2021.



Specific
Measurable
Attainable
Relevant
Time-Bound

Objectives/ Key Results

- Objectives
- Key Results



Three Types of Key Results

1. Predetermined standards set for the job, irrespective of the employee performing it.
2. Past performance of department or team to serve as a standard or point of comparison.
3. The employees, as individuals, to serve as their own standard, comparing their current performance with where they were or should be.

OKR Example

Objective

Employee customer service rating will meet or exceed 85% satisfaction for fiscal year ending June 30, 2021.

Key Results

- Increase customer call volume to a weekly average of 40 calls per day by January 30, 2021 and to 50 calls per day by April 1, 2021.
- Follow departmental customer service standards on all client calls

Goal Setting Criteria

1. Can it be readily understood by those who must implement it?
2. Is it measurable and verifiable?
3. Is the objective a realistic and attainable one that represents a challenge?
4. Does it relate to the roles, goals, mission of the unit, department, or group?
5. Is it consistent with basic organizational policies and practices?
6. Does it include deadlines?
7. Will the outcome justify the expenditure of time and resources required?
8. Can accountability for outcome be clearly established?

How Many to Assign

At any time, all non-represented staff will have 3-5 goals.

- 1 professional development goal
- 2-4 remaining goals that include one or more of the following:
 - Key job responsibilities
 - Special projects or initiatives
 - Stretch assignments
 - UCB contribution (e.g. committee service, mentoring, community of practice, etc.)



Frequency

Individual goals can be set for any length of time (1 month, 4 months, 2-years, etc.).

Examples:

- Goals lasting 1-4 months, check-ins create a great space to reflect on what/how results were achieved, with future goal-planning as the next step.
- Goals lasting over multiple check-in period (such as 1-2 years), check-ins can serve as mile markers on their goal completion journey, focused on what/how results are being achieved through this longer-form of planning.

Achievement Criteria & Performance Levels

Achievement Criteria

The Achievement Criteria are a tool for managers and employees to discuss and evaluate performance. They are also an integral part of the check-in conversation process, in which each of the check-in questions addresses one of the criteria.

The criteria are:

- Collaboration
- Goal Accomplishment
- Inclusion & Belonging
- Innovation
- Job Mastery

For each of the five criteria, employees will find themselves in one of three Performance Levels at any given time:

- Needs Attention
- Well Done
- Stand Out

[Download the Achievement Criteria Quick Guide](#)

Collaboration

Enhances individual work by soliciting contributions from others and enhances others' work by contributing to their success to more effectively meet unit goals.

Needs Attention	Well Done	Stand Out
All Non-Rep Employees		
<ul style="list-style-type: none"> - Does not volunteer to support others - Inflexible or unconstructive - Shuts down communication and/or collaboration among employees 	<ul style="list-style-type: none"> - Volunteers to support others - Flexible and constructive - Consistently communicates openly and partners effectively to get work done 	<ul style="list-style-type: none"> - Prioritizes volunteering to support others - Sought after to lead or participate in collaboration - Always facilitates open dialogue among appropriate contributors and is a role model for collaborative work
Manager/Supervisor		
<ul style="list-style-type: none"> - Does not hold team accountable for follow-through - Does not share information with others - Does not facilitate conflict resolution 	<ul style="list-style-type: none"> - Consistently holds team accountable for collaborative expectations - Ensures team coordinates shared work - Facilitates conflict resolution 	<ul style="list-style-type: none"> - Always ensures team follows through above collaborative expectations - Anticipates needed information and stimulates knowledge exchange - Develops skills for collaborators to constructively resolve conflict

Goal Accomplishment

Achieves individual goals that contribute to unit priorities.

Needs Attention	Well Done	Stand Out
All Non-Rep Employees		
<ul style="list-style-type: none"> - Does not achieve goals - Does not focus on critical issues - Does not use resources appropriately (tangible or intangible) 	<ul style="list-style-type: none"> - Achieves goals - Consistently prioritizes critical issues - Uses resources (tangible or intangible) appropriately 	<ul style="list-style-type: none"> - Exceeds goal expectations - Always prioritizes critical issues - Models effective use of resources (tangible or intangible) for self and others
Manager/Supervisor		
<ul style="list-style-type: none"> - Does not align individual/team goals with unit priorities - Does not enable team to achieve goals 	<ul style="list-style-type: none"> - Consistently aligns individual/team goals with unit priorities - Consistently enables team to achieve goals 	<ul style="list-style-type: none"> - Always models effective individual/team goal alignment with unit priorities - Enables team to exceed goal expectations

Inclusion & Belonging

Demonstrates respect for people and their differences, regardless of race, ethnicity, class, gender identity and expression, sexual orientation, socioeconomic status, ability, country of origin, cultural, political, religious, or other affiliations. Understands the benefits of a diverse workforce, is trusted and respected by others, includes and welcomes others, and works to understand the perspective of others.

Needs Attention	Well Done	Stand Out
All Non-Rep Employees		
<ul style="list-style-type: none"> - Does not value, encourage, or adapt to different perspectives - Lacks sensitivity of other cultural norms or ways of communicating - Uses language and behavior that is exclusionary or offensive 	<ul style="list-style-type: none"> -- Values differences and applies others' perspectives to get results - Sensitive to cultural norms, expectations, and ways of communicating - Uses inclusive and non-offensive language and behaviors 	<ul style="list-style-type: none"> - Appropriately encourages and incorporates diverse points of view for enhanced results - Senses how and takes action related to how differences impact needs, values, and motivators - Creates a culture of inclusion that does not tolerate exclusionary language and behavior
Manager/Supervisor		
<ul style="list-style-type: none"> - Does not hold team accountable to the inclusion-belonging indicators for non-rep staff 	<ul style="list-style-type: none"> - Makes known effort to hold team accountable to the inclusion-belonging indicators for non-rep staff 	<ul style="list-style-type: none"> - Sought out as subject matter expert, mentor, and advisor, resulting in stand-out performance in the inclusion-belonging indicator for non-rep staff

Discussing Inclusion & Belonging in Check-ins

Coaching Question	DEI Version
What does success look like?	<ul style="list-style-type: none"> What is your near-term vision for greater diversity, equity, and inclusion with your team?
What would you change about who you are?	<ul style="list-style-type: none"> What do you want to change about diversity, equity, and inclusion on your team?
What stands between you and where you want to go?	<ul style="list-style-type: none"> What stands between where your team is now with respect to diversity, equity, and inclusion and what you want it to be?
What do you take the most pride in?	<ul style="list-style-type: none"> What have you done recently to become more inclusive on your team and which makes you proud? What have you done recently to promote equity across your team and which makes you proud? What have you done recently to generate a sense of pride about the diversity on your team?
What makes you feel alive when you're doing it?	<ul style="list-style-type: none"> What have you done recently about DEI issues that made you feel really good? What has your team done recently about DEI issues that made people feel good?
What are you most fearful of?	<ul style="list-style-type: none"> What are the unspoken concerns on your team about diversity, equity, and inclusion? How can you create the safety that's needed to have these concerns be heard?
What's missing from your life right now?	<ul style="list-style-type: none"> What is missing on your team that would help generate meaningful conversations about diversity, equity, and inclusion?
What's the one thing you're avoiding that you know you should do?	<ul style="list-style-type: none"> What is one thing about diversity, equity, and inclusion that you're avoiding on your team and that you know you should be doing something about? What is one thing about diversity, equity, and inclusion that's being avoided on or by your team that you know something should be done about?
What stands in your way? Is it that you want to look good? Be right? Be in control?	<ul style="list-style-type: none"> What stands in your way of becoming a stronger champion for diversity, equity, and inclusion in the organization? What can we do together to help you with this?
What is going on under the surface?	<ul style="list-style-type: none"> What can you do as a leader to bring DEI issues forward on your team?

Innovation

Uses knowledge, skills, and professional experience to seek efficiencies and improve work outcomes.

Needs Attention	Well Done	Stand Out
All Non-Rep Employees		
<ul style="list-style-type: none"> - Does not flexibly adapt to change or seek efficiencies - Discourages diverse and creative initiatives of others - Does not experiment with new ways of thinking or doing 	<ul style="list-style-type: none"> - Seeks efficiencies and adapts to change - Encourages diverse thinking to nurture innovation - Comes up with useful ideas that are better or unique 	<ul style="list-style-type: none"> - Challenges low-value practices and leads changes that enhance effectiveness - Finds and champions the most diverse and creative ideas and proposes action - Moves beyond traditional practices and pushes beyond the status quo
Manager/Supervisor		
<ul style="list-style-type: none"> - Creates environment that discourages creative and diverse ideas or initiatives 	<ul style="list-style-type: none"> - Creates environment that encourages creative and diverse initiatives 	<ul style="list-style-type: none"> - Enables team to actively implement diverse and creative value-add opportunities

Job Mastery

Demonstrates the knowledge, skills, and abilities that result in high performance and contributions within the scope of the employee's job description.

Needs Attention	Well Done	Stand Out
All Non-Rep Employees		
<ul style="list-style-type: none"> -- Does not perform job functions effectively - Does not make decisions within scope of role and job description guidelines - Not receptive to direction, coaching, feedback, and development 	<ul style="list-style-type: none"> - Performs job functions effectively and may exceed work expectations - Makes sound decisions within scope of role and job description guidelines - Responsive to direction, coaching, feedback, and development 	<ul style="list-style-type: none"> - Always demonstrates expertise in completing job functions - Always demonstrates effective decision making with scope of role and enables sound decision-making up/down stream from role - Takes ownership of development, seeks feedback, highly coachable, anticipates and accepts guidance and direction
Manager/Supervisor		
<ul style="list-style-type: none"> - Does not effectively manage, develop, or support learning to improve performance - Does not engage team or observe/discuss performance/development goals - Does not align teamwork with unit priorities 	<ul style="list-style-type: none"> - Effectively pursues improvement of team skill sets - Effectively engages team via managing performance, change, and appreciation - Ensures teamwork is equitably distributed and aligned with unit priorities 	<ul style="list-style-type: none"> - Excels as a coach, resulting in outstanding team performance contributions - Always manages and empowers to the highest levels of employee engagement - Demonstrates consistent promotion of self/team's responsibility over scope of roles

Performance Levels Inform the Merit Process

1 Overall Official Performance Level within the Merit Cycle

Apr 1–Mar 31

Needs Attention | Well Done | Stand Out

- Overall performance levels determined by using the indicators listed in the Achievement Criteria and documentation from check-in conversations.
- Each performance indicator is weighted equally
- Overall "needs attention" = no merit

Manager/Supervisor Commitment & Responsibility?

Taking responsibility for both results and behavior:

- Promoting behaviors that support UC Berkeley's mission and defending against unacceptable conduct
- Set clear expectations around results and behavior
- Address behaviors that need attention, even when actions/behaviors do not rise to the level of a policy violation
- If management continues to observe or receive complaints, management has a responsibility to act.



Check-in Conversations

What's a Check-in?

- Ongoing 1on1 conversations between managers and employees
 - Goals, expectations, plans of action, support for improvement
- Occur as part of 1on1 mtgs
- Documented every 4 months
- Simple, lightweight, flexible



Understanding the Guided Check-in Questions

- Each check-in includes discussion around 6 guided questions, which map to the Achievement Criteria
- These conversation starters set up opportunities to:
 - Go deeper on topics
 - Address performance challenges
 - Recognize successes
 - Plan for next steps
 - Find out ways to better support one another toward greater achievement
- Do I need to ask these each time? YES!

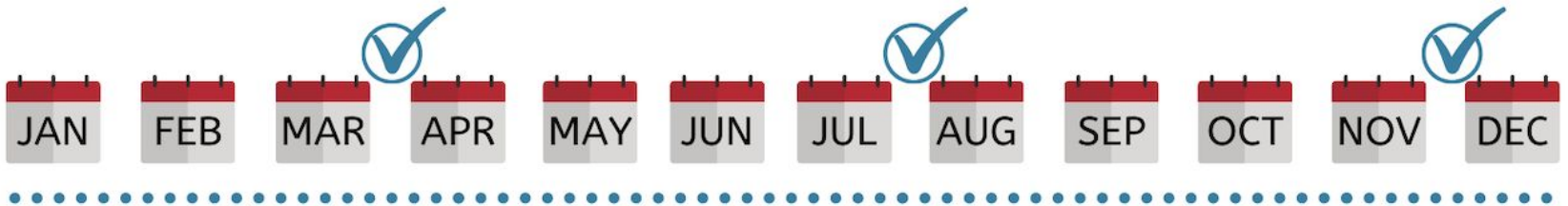
Guided Questions Mapped to the Achievement Criteria

1. What goals did you accomplish this period? In what ways does your work connect to our overall strategy and/or mission? (**Goal Accomplishment & Job Mastery**)
2. What do you like best about your work? (**Goal Accomplishment**)
3. How have you supported others' work and/or collaborated with others on your work this period? (**Collaboration**)
4. How have you innovated to seek efficiencies or improve work outcomes? (**Innovation**)
5. How have you fostered diversity, equity, inclusion and/or belonging on our team and campus? (**Collaboration & Inclusion**)
6. What can I do as your supervisor to better support your success? What additional knowledge, resources, or tools are needed to successfully do your job? (Development Planning & Manager Support)

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Check-in



Ongoing 1on1s & feedback

Before the Check-in Conversation

	Manager	Direct Report
Before	<ol style="list-style-type: none"> 1) Plan how you will apply coaching skills to check-in meeting, especially how to help your direct report talk about their performance, to listen-in to an individual's work experience, and to help them be successful. 2) Review the Achievement Criteria to consider current and future states of work, and what you can do to support your direct report's acquisition of knowledge, skills, and support to be successful. 	<ol style="list-style-type: none"> 1) Reflect on current state of work, where it's going, what's needed for success, and the quality of your work experience, including the relationship with your manager. 2) Use the Achievement Criteria check-in questions as a guide for preparing to talk about your work performance (job mastery, goal accomplishment, collaboration, innovation, and inclusion).

Incorporating Feedback

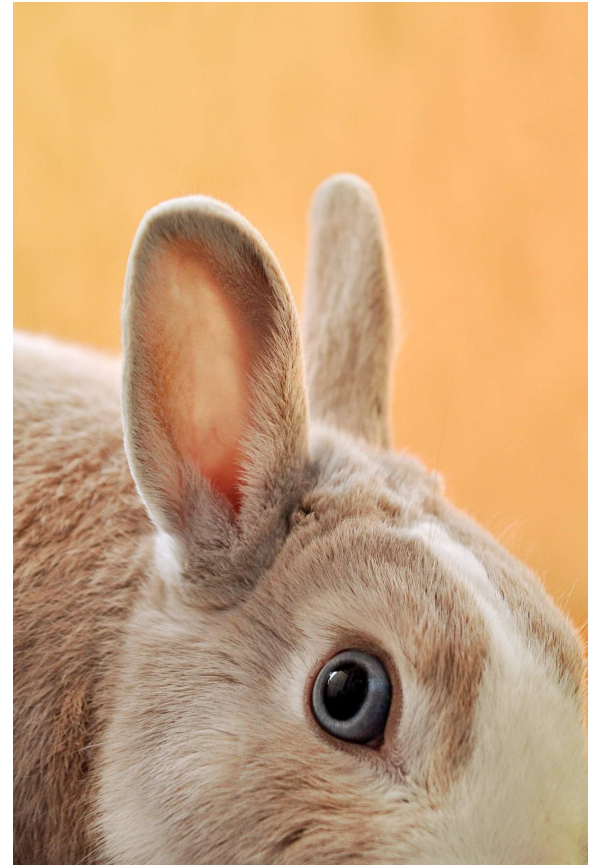
- Feedback mechanisms are **NOT** required for the Achieve Together online form, but it can be incorporated
- If you would like to gather feedback or have already been done so, you can continue to do so
 - This can be from other work-leads, co-workers, etc.

During the Check-in Conversation

	Manager	Direct Report
DURING	<ol style="list-style-type: none"> 1) Use the Achievement Criteria check-in questions to encourage the employee to focus on current progress and experience, in addition to future performance planning. 2) Use terminology that makes sense in your everyday conversations, rather than a rote reading of the check-in questions. The goal is to have a meaningful conversation, not a formal interview. 3) To go deeper in the conversation, use open ended questions to check for clarity and explore the employee's work experience. Seek to understand through finding agreement and explore discrepancies. 4) During the conversation, jot down key information to input in the Achieve Together online documentation tool following the check-in. 5) Be sure to check-in on goal accomplishment expectations for the next four months. Ensure alignment with team, unit, and campus strategies. 	<ol style="list-style-type: none"> 1) Use the Achievement Criteria check-in questions to discuss your current work progress and experience, in addition to future performance planning. These questions are pathways to go deeper on topics, issues, and themes, and not to limit the extent of the conversation. 2) Be open to feedback, partner in problem solving, and take ownership over your achievements and areas for improvement. 3) Spend time discussing additional knowledge, skills, and support needed for success at UC Berkeley. 4) During the conversation, jot down key information to input in the Achieve Together online documentation tool following the check-in. 5) Check-in on goal accomplishment expectations for the next four months.

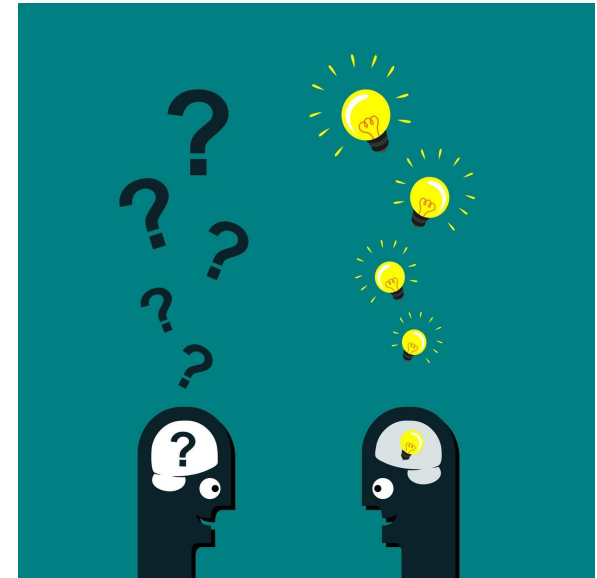
Attentive, Intentional Listening

- Directly face the person
- Don't fill the silence – wait for more to come
- Get rid of all distractions
- Nod and use body language to acknowledge
- Keep an open mind – hold back your judgement and opinions
- Focus on listening – not what you are going to say next
- Don't interrupt
- Paraphrase what you heard to clarify



Ask Powerful Follow-Up Questions

- Open-ended – start with What, How
- Focused and thought-provoking
- Help employees and managers/supervisors learn through reflection
- Not leading questions (advice in disguise)



Some Powerful Questions

- What does success look like?
- What have you tried in the past?
- What have others done that has worked?
- What information do you need?
- What do others think?
- Who might support you?
- What will you do, when?
- What obstacles might you face?
- How will you overcome them?



Use the UC Berkeley Coaching Model

- **Discover** – examining obstacles
- **Explore** – identify possible solutions
- **Plan** – for ongoing improvement
- **Act** – support high performance

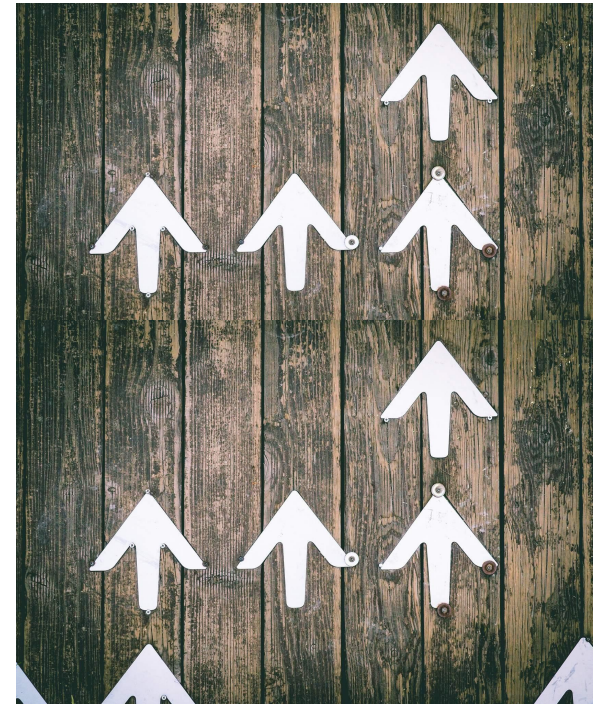


After the Check-in Conversation

	Manager	Direct Report
AFTER	<ol style="list-style-type: none"> 1) Open an Achieve Together documentation form for the check-in period on your performance dashboard. Once open, it is automatically available for staff. 2) Review key highlights of the conversation from your perspective and document in the Supervisor Comments section of the form. 3) Document any updates to goals that were discussed during the check-in conversation. These updates are to reflect the next four months of goal completion expectations. 4) Save and finalize the form to complete your part of the check-in period. 5) Ensure you have 1on1s schedule between check-in conversations to connect on work expectations, goals, priorities, and necessary support for success. 	<ol style="list-style-type: none"> 1) Open and review the form that will appear in your inbox from your supervisor. 2) Review key highlights of the conversation from your perspective and document these in the Employee Comments section of the form. 3) Review goal updates made by your supervisor based on what was discussed in the check-in conversation. Connect with your manager if there are questions or concerns. 4) Save and finalize the form (signifying you reviewed the content in full) to complete the check-in period. 5) Ensure you have 1on1s schedule between check-in conversations to connect on work expectations, goals, priorities, and necessary support for success.

Addressing Performance Challenges

1. Schedule a meeting with Flori Ramos for assistance with creating a Performance Improvement Plan (PIP)
2. Manager presents the PIP to the employee
3. Manager supports the employee through the PIP
4. Did the employee succeed at meeting the expectations outlined in the PIP?



Check-in Form Documentation

Documentation Dashboard Process

Step	Manager/Supervisor	Direct Report
1	Start and share new form for direct reports. Select conversation period. Select conversation date.	Receives form via email, ready for edits
2	Add supervisor notes/comments on guided questions for current period	Add employee notes/comments on guided questions for current period
3	Update direct report goals for next 4-month period	Review updates made by your manager/supervisor on goals for next 4-month period
4	Finalize notes/comments. All done!	Finalize notes/comments. All done!

- Shared document – both participants see updates
- In-depth user guide:
<https://docs.google.com/presentation/d/1pJUIZS2jkXj2hX3rWmsudagqTbIKst-80CBmoqSuxPE/edit?usp=sharing>

Revisiting Goals

Goals can be revisited at any time – no need to wait for a scheduled Achieve Together check-in.

Use the Achieve Together Check-in form

Current Goals (July 1, 2019 to November 30, 2019)

The goals below are from the above referenced period. Supervisors may add or modify goals as needed. For more information on goals please visit our [performance management goals page](#) where you can structure your goals appropriately.

Example: Professional Development Goal

Please consider one or more of the following goal types: Special Projects or Initiatives, Stretch Assignments, Key Job Responsibilities, Contribution (committee service, mentoring, community of practice, etc.)

Please consider one or more of the following goal types: Special Projects or Initiatives, Stretch Assignments, Key Job Responsibilities, Contribution (committee service, mentoring, community of practice, etc.)

+ Add Goals

Comments on Current Period Goals

Please provide comments on goals for the current period.

Supervisor Comments *

Supervisor Comments

Employee Comments

Employee Comments

Next Period Goals (December 1, 2019 to March 31, 2020)

Enter goals for the next period. Supervisors may add or modify goals as needed. For more information on goals please visit our [performance management goals page](#) where you can structure your goals appropriately.

Example: Professional Development Goal

Please consider one or more of the following goal types: Special Projects or Initiatives, Stretch Assignments, Key Job Responsibilities, Contribution (committee service, mentoring, community of practice, etc.)

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Additional Learning

Achieve Together Website

<https://hr.berkeley.edu/performance/achieve-together>

Includes:

- Knowledge Base
- Program Overview
- Achieve Together Toolkit
- Additional Training
- Tutorial videos
- LinkedIn Learning
- Gartner Resources
- BPM 206 Growing as a Coach
- Cal Coaching Network
- Achieve Together Practice Labs