The *Supervisor's Guide to Measuring Employee Performance* offers overall performance management and evaluation guidance that should apply to all employees whether they are on-site or telecommuting. Performance management is a cycle that builds on continual feedback and ongoing evaluation – both positive and developmental. The process includes setting clear expectations and performance outcome measures, observing behavior and performance, providing feedback, support, corrective action, and conducting regular performance evaluation meetings.

Telecommuting Arrangements for Staff Employees

SHSU permits employees to telecommute on a temporary, case-by-case basis when doing so serves the best interest of the University and is approved in advance by the department head. The *Finance & Operations Human Resources Policy (ER-12) Telecommuting Arrangements for Staff Employees*, provides guidance for SHSU supervisors and staff for telecommuting arrangements. Telecommuting is defined as approved temporary performance of work assignments from a remote location other than the employee's regularly assigned place of employment arrangement for a period of up to six (6) months. Telecommuting may be approved for intermittent or consecutive periods. Telecommuting that exceeds five business days requires prior written approval of the department head and Division Vice President. The policy requires supervisors to define expected performance outcome measures appropriate for the proposed telecommuting employee's job assignment before approving a proposal. This guide will assist supervisors with how to set performance outcome measures and overall tips for managing remote employees.

Set Performance Outcome Measures using SMART performance goals

Goal setting is one of the most powerful ways to direct energy and focus, measure, and evaluate employee performance. Goal setting is a powerful driver of performance. Goals work best when they are challenging and meaningful to the employee. Setting performance goals can typically be accomplished with the use of a SMART goal:

- Specific
- Measurable
- Achievable
- Realistic *and*
- Time-bound

Goals work best when they are a stretch to meet, but not so difficult that they are unattainable. The more specific and measurable the goal, the more likely it is the employee will achieve the desired results.

<u>Effective Examples of SMART Goals:</u>

- By X date launch the web page advertising the new service to students.
- Handle at least XX service calls per day with fewer than Y callbacks for the same problem.
- Enhance division visibility by publishing an article on X topic by Y date.
- Process travel reimbursements within X business days.
- Publicizing our upcoming event on a variety of social media outlets, resulting in XX event registrations on our website.

<u>How to set performance outcome measures:</u>

As the supervisor, always begin by articulating your strategy. For example, use the SMART (<u>S</u>pecific, <u>M</u>easurable, <u>A</u>chievable, <u>R</u>ealistic, and <u>T</u>ime-bound) performance goal framework, previously discussed in this guide, to set objectives/goals and determine a strategy for achieving them.

In setting performance outcome measures, begin by **clearly describing the intended results**. Meaningful measures require clear intended results. Measurement is specific, so confirming understanding with your employee on definitions and expectations is critical. For example, the objective to "improve customer service" might sound like a specific objective. However, one team member may interpret this to mean that customer calls must be returned within two hours while another team member defines customer service as sending the customer a tutorial on the task in question. Once you confirm the employee understands the intended result, it is easier to define what to measure.

Secondly, **analyze how you can measure the results**, starting with these questions: Can the intended result be measured directly? Is there a clear way to capture the entire intended result in one or more measures? If the answer is yes, identify the most appropriate direct measure. If the answer is no, determine if what you are attempting to measure is, in fact, measurable. As the supervisor, you need to drill-down to create measurement(s) that can be analyzed in order to determine if performance is acceptable or if the employee is underperforming. For example: in the above 'improve customer service' objective, you will need to breakdown the objectives into measurable components such as; what is the acceptable amount of time that a customer's call needs to be returned in or what steps should be taken to assist a customer before escalating the issue to a higher level for assistance? If the intended result of improving customer service is too big of a result to measure by just one object, you will need to create several outcomes to measure exactly what it is that you are trying to improve for the customer. Brainstorm with your employee or your stakeholders on what "success" looks like once the goal is achieved to determine a good way to clarify a measurable result. Be careful to use metrics that are meaningful and relevant. Do not burden your employees with unnecessary data collection.

Finally, **set targets and thresholds**. Describing desired performance levels and determining how data is interpreted is as important as selecting the measure. Performance is based on targets, the desired level of performance for a specific reporting period, and thresholds. Thresholds are the

upper and lower limits of desired performance. Thresholds create the exact points where performance exceeds expectations, meets expectations, or does not meet expectations.

It is important to remember that performance outcome measures are not permanent. You and your employee should expect them to change over time.

Performance measures are used to observe progress and to measure actual results compared to expected results. They are usually expressed in quantifiable terms and should be objective and measurable (numeric values, percentages, scores).

Below are examples of Performance Outcome Measures:

Example 1 – Decrease supply costs with timely purchasing of supplies

Overall Goal – Decrease the overall cost associated with the timely purchasing of supplies for the department.

Performance Outcome Measure – Complete the required purchase of supplies for the department in a timely manner, while decreasing the total amount spent by 5% as compared to the previous fiscal year.

Evaluation of Performance Outcome Measure – The timely aspect of this measure will be achieved by making sure the department does not run out of supplies (i.e., never has to borrow paper, etc.). The total cost spent for supplies for the current fiscal year will be compared to the total amount spent for the previous fiscal year to determine if the result was a 5% overall decrease in cost.

Data Collection Plan – The supervisor could request and review supply cost details on a monthly basis as compared to the same months during the previous fiscal year. If the cost for each month of the current fiscal year is not less than the amount spent during the same month the previous fiscal year, the supervisor could include time during team meetings to discuss the employee's strategy to reduce supply cost moving forward in order to achieve the performance outcome measure for the fiscal year. The timely portion of the measure will be achieved if the department does not run out of supplies.

Example 2 – Increase training sessions offered

Overall Goal – Increase the number of training sessions offered by the department.

Performance Outcome Measure – Increase the number of training sessions offered each month to achieve a 5% overall increase in sessions offered as compared to the previous year.

Evaluation of Performance Outcome Measure – The number of training sessions offered during the current year will be compared to the number of sessions offered during the previous year to determine if the result was a 5% overall increase in sessions offered.

Data Collection Plan – The supervisor could request and review the number of training sessions offered each month as compared to the number of sessions offered the same month of the previous year. If the number of sessions is not increasing each month as compared to the same month during the previous year, the supervisor could include time during team meetings to discuss the employee's strategy to increase the number of sessions offered in order to achieve the performance outcome measure for the year.

Performance outcome measures should be closely monitored and adjusted accordingly. Have monthly or even weekly one-on-one meetings with your team members, and talk to them as often as possible about their performance outcome measures.

Overall tips for managing remote employees

When you are in the same office as your employee, it is easy to provide feedback and gauge reactions. When your employee is working remotely, supervisors may face different challenges. So how do you manage the performance of remote employees? Here are some practical tips from Jack Altman, *Lattice Magazine* ("Performance Management for Remote Workers," January 2, 2020) and Yael Zofi, *AIM Strategies*, ("The Innovative Manager," October 2019) to keep in mind when supervising telecommuting employees.

Set expectations from the onset

When employees know what to expect, they can perform accordingly. One of the biggest problems remote employees have is understanding parameters for acceptable behaviors, interactions, and workflow. Unlike on-campus employees, remote employees cannot learn from just observing their peers and manager. Without direction, they will have a much steeper learning curve for knowing what is expected of them. Therefore, it is critical that you clearly define work requirements from the beginning. Make sure all employees know what is expected of them, which may include:
- Meeting set performance metrics on a weekly basis
- Accomplishing predetermined goals
- Providing project updates
- Sticking to task timelines
- Working agreed-upon business hours

That said, employees will appreciate a bit of wiggle room in schedules to deal with home-based matters. As long as each person knows what he or she is accountable for, having some flexibility will help build loyalty and trust.

<u>Set up a schedule for regular check-ins</u>

Regular check-ins keep both supervisor and employee updated on progress and expectations. When you manage remote employees, checking in regularly helps to facilitate feedback and build rapport. Having regularly established one-on-one meetings will keep you updated throughout the year, and provide opportunities for employees to speak directly to you about successes or problems they might have. Employees are eager for feedback, and your undivided attention is important for them. Remember to take notes after the meeting of any issues that need to be addressed and appropriate action items. To a manager, these things are easily overlooked or forgotten when the person is not in view; however, such matters often remain at the forefront of your remote employee's mind.

<u>Try to use video conferencing when possible</u>

Communication with your employees is vital for success. Technology can make managing remote employees easier with the use of available video conferencing technology such as Zoom, Skype, WebEx or other popular applications to provide feedback. Discussing items face-to-face requires more attention from the supervisor and accountability from the employee.

<u>Ask for status updates</u>

Ask employees to keep a weekly log of their work. That way, both parties can keep track of what is getting done. Even if you do not look at the log every day, you will be able to see progress over time. These updates are also helpful for both of you to reference during one-on-one meetings and evaluations. Such records help keep a manager from overlooking accomplishments while keeping employees accountable.

<u>Set action items and goals with deadlines</u>

When managing any employee's performance, it is important to set goals. It is an absolute necessity when managing the performance of remote employees. Remote employees need to have action items and goals with deadlines established by their supervisor. Deadlines help employees to plan work, create task calendars, and clearly understand what is expected of them. Deadlines provide opportunities for regular check-ins to see if an employee is managing assignments according to your expectations. Follow up on action items with employees to see how goals are being met.

The attached appendix provides a list of resources available through Talent Management that will provide further guidance for the supervisor of telecommuting employees.

Appendix: List of SkillSoft Resources

The following is a list of video courses on managing remote or telecommuting employees that is available through Talent Management in the SkillSoft E-Library. To access a course, go to Talent Management (SHSU Website>Campus Tools>My Sam>Employees tab>Human Resources channel). Click on the Talent Management link. Input any of these titles in the search bar at the upper right section of the page.

Managing Telecommuting Employees

Video Title	Description
Establishing Effective Virtual Teams	Building and managing teams is enough of a challenge when everyone is in the same location. Collaboration when working on a team that's virtual requires even more commitment. In this course, you'll learn about teamwork and team leadership when working on a virtual team. You'll cover remote management and tactics for communication, assessment, and meetings for virtual teams.
Leading Teams: Managing Virtual Teams	Virtual teams are emerging as the basic unit for conducting business of all types. Studies show that over 80% of workers today are involved in some way with team members who are not physically located in the same office. Virtual communication networks have made virtual teams possible, while globalization has made them a necessity. Leading virtual teams presents new challenges to leaders and managers. Virtual team leaders must find ways to successfully manage people who are separated by distance, time zones, and cultural differences. This course offers leaders a framework for successfully leading virtual teams. It outlines the key competencies that members of virtual teams should possess and offers guidelines for specific virtual team activities, such as teleconferencing and decision making. It also highlights a variety of tools and technologies that are commonly used for collaboration on virtual teams and presents guidelines for knowing how to

	choose the right technologies for specific situations. Materials designed to support blended learning activities aligned with this course are available from the Resources Page.
Managing Communications in a Virtual Team	The manager of a virtual team must master excellent communication and understand the importance of virtual presence technologies. Learn how the manager of a virtual team can improve team communication and collaboration.
Facing Virtual Team Challenges	Virtual teams can face the same difficulties as other teams, but also have unique challenges. In this course, you'll learn how to handle challenges facing your team, and how to evaluate your own style.