INSTRUCTOR BIOGRAPHY:
Larry Bourgerie is an educator and HR professional with over twenty-five years experience in human resources and fifteen years teaching at the University level. He has held positions as an HR Consultant, SVP/Director of HR at TruStone Financial, HR Director at TCF Bank, OD Coordinator at HealthPartners, Inc. and The Pillsbury Company. He consults in leadership, organizational and employee development, with a client list including Park Nicollet, Medica, University of St. Thomas, State of Minnesota, City of Minneapolis and Hennepin County. He earned his B.A. in Business and his Master of Arts in Industrial Relations from the University of Minnesota Carlson School of Management. He has SPHR and SHRM-SCP certifications from the Society for Human Resource Management (SHRM), is active in state and national chapters of SHRM, and is a past president of Twin Cities Human Resource Association. He teaches HR Management, Organizational Behavior and Performance Management.

TEACHING PHILOSOPHY:
I see my role as an instructor to design a course that provides you with the best course content available and to facilitate a learning environment that stimulates your thinking around the subject, to encourage you to think critically about the challenges of business and leadership today, and integrate your learning.

COURSE DESCRIPTION
This course focuses on theories, strategies, practices, and ongoing issues in the management of employee performance, developing employee potential, supporting professional growth and career development in organizations. It provides an overview and analysis of human resource practices and systems dealing with performance management, talent management, training and development, coaching and compensation. We will also explore current topics in the field of performance management and talent management.
COURSE OBJECTIVES

Upon completion of this class, students will:

- Understand the components of an effective Performance Management system in an organization and the importance of aligning with other HR systems
- Understand the role of Talent Management as a key component of the Performance Management Process.
- Understand what Performance Management is, and its positive impact on organizations
- Identify the difference between Performance Appraisal and Performance Management
- Analyze the different types of Performance Management systems and identify advantages/disadvantages of each
- Understand how a Performance Management system works are interdependent with recruiting, on-boarding, compensation, and employee development
- Understand the components and differences of performance feedback and performance coaching and how to apply each of them
- Have working knowledge of the methods used to coach/train supervisors to effectively execute a Performance Management system
- Understand how a Performance Management system plays into overall employee engagement and morale
- Explore the role of culture & civility as a foundation of of performance management
- Be able to apply strategies to develop positive culture to support Performance Management Systems
- Explore what the research say about the ROI of formal/informal Performance Management systems
- Apply skills in analyzing, evaluating and improving performance

COURSE METHODOLOGY

A combination of lecture, large and small group discussions, case studies, exercises, video materials will be used to maximize learning for all participants. Addition videos of content is available on Moodle each week. Good for review or if you miss class.

REQUIRED MATERIALS


   Course Packet Articles and Case Studies (CP)
   - HRB Case Study; Performance Management at Vitality Health Enterprises, Inc.; John B. Bingham, Michael Beer
   - Case Study; Margaret Jefferson: Performance Issue at a Performing Arts Company (A), Ivey
   - Conducting a Performance Appraisal Interview; John B. Bingham, Michael Beer
   - Formal Performance Appraisal: Improving Results Through Feedback, HRB
   - Differentiation of Talent; Rethinking Performance Management, HRB, Dick Grote
   - Performance Management That Drives Results, Harvard Management Update, Loren Grey
   - Performance Management in the Gig Economy; HRB, Jon Younger & Norm Smallwood
   - Reinventing Performance Management; HRB, Marcus Buckingham and Ashley Goodall

Please note: There are optional readings and optional videos in Moodle. A number of the videos are summaries of the lecture and are helpful if you miss class or want additional review of material.
ASSIGNMENT POLICIES
All papers and projects should be turned in on the due date listed in the schedule or on Moodle. Late work loses up to 10% that day and up to 10% each day afterward.

All papers should be handed in during class unless and submitted via Moodle. All papers and projects should be 1.5 spaced in 11-12-point font and in APA format.

ASSESSMENT GRADING SUMMARY

<table>
<thead>
<tr>
<th>Component</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Engagement: Attendance, Preparation and Participation</td>
<td>10%</td>
</tr>
<tr>
<td>Weekly Moodle Quizzes</td>
<td>15%</td>
</tr>
<tr>
<td>Case Study – Jefferson (Individual)</td>
<td>20%</td>
</tr>
<tr>
<td>Case Study – Vitality HealthCare (Team)</td>
<td>20%</td>
</tr>
<tr>
<td>Exam (Take Home Essay)</td>
<td>35%</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

ASSIGNMENT DESCRIPTIONS

Engagement – A behavior anchored scale will be posted and discussed in class to give you more clarity on expectations (rubric)

Case Studies - There will be two cases (1 group one individual) to help you apply material to real life situations. These can be found in the Course Packet. Details will be provided in class.

Moodle quizzes - Weekly quizzes on Moodle to give you ongoing feedback on your “performance”. The quizzes include text readings and articles. These are timed and you have 30 minutes to complete. Some of the questions will require you to integrate your thinking not just a simple question from readings.

Final Exam - Will consist of essay questions. It will be a take home exam.

EVALUATION
In order to improve your leadership and management skills, you will evaluate yourself in addition to my assessment. Though being evaluated is somewhat uncomfortable for most of us, you may find it one of the most beneficial aspects of the course. It is the same process used in performance appraisal systems.

GRADING IS AS FOLLOWS:
A/A-: Superior Performance – Total understanding of all materials with superior demonstrated ability to integrate and apply knowledge
B+/B/B-: Good Performance – Excellent understanding of all materials with demonstrated ability to apply knowledge to most situations
C+/C/C-: Average Performance – Adequate understanding of most materials with demonstrated ability to apply knowledge to most situations

*Integration of work means citing references from readings, lectures and outside readings rather then offering a narrative regarding the question or topic.*
CLASS POLICIES

Student Expectations

Each student is expected to:

- Attend all class sessions. If a student has to miss a class for a valid reason, it is the responsibility of the student to cover the materials discussed. Email instructor to confirm absence. Check Moodle and email regularly for updates.
- Submit assignments and tests on time. Late assignments will be penalized 10% for each day.

CSOM Academic Policies

Student Conduct Code:

The University seeks an environment that promotes academic achievement and integrity, that is protective of free inquiry, and that serves the educational mission of the University. Similarly, the University seeks a community that is free from violence, threats, and intimidation; that is respectful of the rights, opportunities, and welfare of students, faculty, staff, and guests of the University; and that does not threaten the physical or mental health or safety of members of the University community.

As a student at the University you are expected adhere to Board of Regents Policy: Student Conduct Code. To review the Student Conduct Code, please see: http://www1.umn.edu/regents/policies/academic/Student_Conduct_Code.html.

Note that the conduct code specifically addresses disruptive classroom conduct, which means "engaging in behavior that substantially or repeatedly interrupts either the instructor's ability to teach or student learning. The classroom extends to any setting where a student is engaged in work toward academic credit or satisfaction of program-based requirements or related activities."

Use of Personal Electronic Devices in the Classroom:

Using personal electronic devices in the classroom setting can hinder instruction and learning, not only for the student using the device but also for other students in the class. To this end, the University establishes the right of each faculty member to determine if and how personal electronic devices are allowed to be used in the classroom. For complete information, please reference: http://policy.umn.edu/Policies/Education/Education/CLASSROOMPED.html.

Scholastic Dishonesty:

You are expected to do your own academic work and cite sources as necessary. Failing to do so is scholastic dishonesty. Scholastic dishonesty means plagiarizing; cheating on assignments or examinations; engaging in unauthorized collaboration on academic work; taking, acquiring, or using test materials without faculty permission; submitting false or incomplete records of academic achievement; acting alone or in cooperation with another to falsify records or to obtain dishonestly grades, honors, awards, or professional endorsement; altering, forging, or misusing a University academic record; or fabricating or falsifying data, research procedures, or data analysis. (Student Conduct Code: http://www1.umn.edu/regents/policies/academic/Student_Conduct_Code.html) If it is determined that a student has cheated, he or she may be given an "F" or an "N" for the course,
and may face additional sanctions from the University. For additional information, please see: http://policy.umn.edu/Policies/Education/Education/INSTRUCTORRESP.html. The Office for Student Conduct and Academic Integrity has compiled a useful list of Frequently Asked Questions pertaining to scholastic dishonesty: http://www1.umn.edu/oscai/integrity/student/index.html. If you have additional questions, please clarify with your instructor for the course. Your instructor can respond to your specific questions regarding what would constitute scholastic dishonesty in the context of a particular class—e.g., whether collaboration on assignments is permitted, requirements and methods for citing sources, if electronic aids are permitted or prohibited during an exam.

**Makeup Work for Legitimate Absences:**

Students will not be penalized for absence during the semester due to unavoidable or legitimate circumstances. Such circumstances include verified illness, participation in intercollegiate athletic events, subpoenas, jury duty, military service, bereavement, and religious observances. Such circumstances do not include voting in local, state, or national elections. For complete information, please see: http://policy.umn.edu/Policies/Education/Education/MAKEUPWORK.html.

**Appropriate Student Use of Class Notes and Course Materials:**

Taking notes is a means of recording information but more importantly of personally absorbing and integrating the educational experience. However, broadly disseminating class notes beyond the classroom community or accepting compensation for taking and distributing classroom notes undermines instructor interests in their intellectual work product while not substantially furthering instructor and student interests in effective learning. Such actions violate shared norms and standards of the academic community. For additional information, please see: http://policy.umn.edu/Policies/Education/Education/CLASSNOTESSTUDENTS.html.

**Carlson School of Management Course Grading Policy:**

In 2009, the results of a comprehensive study of grading in the Carlson School were presented to approved the following grading policy:

Grades are an integral part of the educational process. They are one form of feedback concerning academic performance. The Carlson School is resolute that the differences in course achievement are reflected in the differences in course grades. Grades are based on a combination of exams, terms papers, class participation, case analyses, and other assignments. In all cases, it is the instructor who determines grading criteria.

Final Grades will be based on an A through F scale following the level of accomplishment outlined by the University of Minnesota:

- **A:** Represents achievement that is outstanding relative to the level necessary to meet course requirements.
- **B:** Represents achievement that is significantly above the level necessary to meet course requirements.
- **C:** Represents achievement that meets the course requirements in every way.
- **D:** Represents achievement that is worthy of credit even though it fails to meet fully the course requirements.
**F:** Represents failure and signifies that the work was either (1) completed but at a level of achievement that is not worthy of credit or (2) was not completed and there was no agreement between the instructor and that student that the student would be awarded a grade of "incomplete."

For additional information, please refer to: [http://policy.umn.edu/Policies/Education/Education/GRADINGTRANSCRIPTS.html](http://policy.umn.edu/Policies/Education/Education/GRADINGTRANSCRIPTS.html).

**Sexual Harassment**

"Sexual harassment" means unwelcome sexual advances, requests for sexual favors, and/or other verbal or physical conduct of a sexual nature. Such conduct has the purpose or effect of unreasonably interfering with an individual's work or academic performance or creating an intimidating, hostile, or offensive working or academic environment in any University activity or program. Such behavior is not acceptable in the University setting. For additional information, please consult Board of Regents Policy: [http://www1.umn.edu/regents/policies/humanresources/SexHarassment.html](http://www1.umn.edu/regents/policies/humanresources/SexHarassment.html).

**Equity, Diversity, Equal Opportunity, and Affirmative Action:**

The University will provide equal access to and opportunity in its programs and facilities, without regard to race, color, creed, religion, national origin, gender, age, marital status, disability, public assistance status, veteran status, sexual orientation, gender identity, or gender expression. For more information, please consult Board of Regents Policy: [http://www1.umn.edu/regents/policies/administrative/Equity_Diversity_EO_AA.html](http://www1.umn.edu/regents/policies/administrative/Equity_Diversity_EO_AA.html).

**Disability Accommodations:**

The University is committed to providing quality education to all students regardless of ability. Determining appropriate disability accommodations is a collaborative process. You as a student must register with Disability Services and provide documentation of your disability. The course instructor must provide information regarding a course's content, methods, and essential components. The combination of this information will be used by Disability Services to determine appropriate accommodations for a particular student in a particular course. For more information, please reference Disability Services: [http://ds.umn.edu/student-services.html](http://ds.umn.edu/student-services.html).

**Academic Freedom and Responsibility:**

Academic freedom is a cornerstone of the University. Within the scope and content of the course as defined by the instructor, it includes the freedom to discuss relevant matters in the classroom. Along with this freedom comes responsibility. Students are encouraged to develop the capacity for critical judgment and to engage in a sustained and independent search for truth. Students are free to take reasoned exception to the views offered in any course of study and to reserve judgment about matters of opinion, but they are responsible for learning the content of any course of study for which they are enrolled. *Reports of concerns about academic freedom are taken seriously, and there are individuals and offices available for help. Contact the instructor, the Department Chair, your adviser, the associate dean of the college, or the Vice Provost for Faculty and Academic Affairs in the Office of the Provost.*

*Language adapted from the American Association of University Professors "Joint Statement on Rights and Freedoms of Students".*