Performance Planning and Workday

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Human Resources
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Agenda

• Welcome
• Overview of Performance Management
  • Performance Planning, On-Going Feedback, Review and Evaluation
• SCU Performance Evaluations in Workday
• Timelines
• Info & FAQs
• Resources
• Questions
Performance Management is NOT:

- Not a once a year event
- Not Manager driven
- Not only about the employee’s responsibilities
- Not a one-way conversation
Performance Review vs. Performance Management

• **Performance Review** is the process of evaluating the quality of your employee’s work and discussing your assessment with them. It is usually conducted annually, with follow-ups as needed.

• **Performance Management** is a process by which managers and employees work together to plan, monitor, and review the employee’s performance objectives, expectations, and their overall contribution to the success of the organization.
When done right, Performance Management can:

• Clarify job responsibilities and expectations
• Develop employee through effective feedback and coaching
• Drive behavior to align with the organization’s core values, goals and strategy
• Enhance individual and group productivity
• Improve communication between employees and managers
The Performance Management Process

Organization Strategies & Goals

Performance Planning

Review and Evaluation

On-Going Feedback
Performance Planning

- Review organization strategies and goals
- Review position description and update if needed
- Review last year’s performance evaluation and goals
- Develop SMART Goals for next rating period
  - Clarify performance expectations
  - Identify training and development opportunities
- Agree upon monitoring process
Review organization strategies and goals

Questions to consider:

• What are the current SCU strategies, goals, and priorities?
• What are your department’s strategies and goals?
• Are there any changes?
• Is your workgroup’s goals in alignment?
Review position description

Questions to Consider:
• How does this position fit into the strategic goals and priorities?
• Is the position description still accurate?
• Are there any changes to job duties since last updated?
Review Last Year’s Performance Evaluation

• Review goals set during the last performance review discussion
• Review identified performance development goals

Questions to Consider:
• What is the status of the goals?
• If not complete, does the goal need to be rolled over? Updated? Is it no longer applicable?
Develop SMART Goals

• **S**pecific – Identify what needs to be accomplished
• **M**easurable – Establish concrete criteria for measuring progress
• **A**ttainable – Can be achieved in the specific amount of time
• **R**elevant – Aligned with current tasks and mission of the organization
• **T**ime-Bound – Have a clearly defined time-frame or deadline date
Having Effective Goals

- Helps an organization accomplish its mission
- Clarifies the specific expectations of the manager and the employee
- Forms a common frame of reference around which they can effectively communicate
- Clearly indicates success, and can cultivate a strong sense of fulfillment for those working toward achieving the goals
# S.M.A.R.T. Goal Examples

<table>
<thead>
<tr>
<th>ORIGINAL</th>
<th>REVISED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improve customer service</td>
<td>Reduce the number of customer complaints by 10% by the end of Q2.</td>
</tr>
<tr>
<td>Clean up the department’s electronic files</td>
<td>By the end of Q3, update the departmental electronic filing system. All documents are on one shared drive and team members report that it is easier to use.</td>
</tr>
<tr>
<td>Try your own…</td>
<td><em>(I or accountable party) will (action word/s) (object of the goal) by (time) for the purpose of (relevance/results).</em></td>
</tr>
</tbody>
</table>
Performance Planning

Organization Strategies & Goals

Review and Evaluation

On-Going Feedback
Ongoing Feedback

- Schedule regular check-ins
- Provide ongoing feedback on progress towards performance expectations and SMART goals
- Identify any barriers that may prevent the employee from accomplishing goals
- Adjust objectives/goals, if needed
- Discuss and review employee development activities (workshops/on-the-job training/etc)
Performance Planning

Organization Strategies & Goals

Review and Evaluation

On-Going Feedback
Review and Evaluation

- Employee completes self-evaluation
- Summarize and highlight employee’s performance over the review period
- Document challenges encountered and identify areas for training/development
- New cycle begins
Guide for Self-Evaluation

- What are your most important accomplishments and achievements?
- Have you achieved the goals set during your previous review?
- Are you struggling with any goals? What’s hindering you from achieving them?
- What do you like best/least about your job?
- What do you hope to achieve in the upcoming year?
- What can your manager or organization do to better help you succeed?
- Gather any supporting documents you’d like to include
Sections of the Workday@SCU Annual Performance Evaluation
Performance Evaluation Sections in Workday

- Results Achieved from Goals set during the rating period (4/1/2019-3/31/2020)
- Position Description review
- Performance Indicator Ratings
- Main Accomplishments
- Goals for Next Review Period
- Supporting Documents
- Overall Comments
Once launched, employees will receive an Inbox item in Workday

Self Evaluation: 2019/2020 Annual Performance Evaluation - Staff
2 day(s) ago - Effective 03/31/2020
**Goals** - Results achieved during current rating period. Will need to refer to goals set in last performance evaluation.

- Enter the SMART goal here (required)

- (Optional) – Break down the goal into Objectives

- Select type of Goal – Development or Performance

- Enter original due date.

- Click on drop down and select a status.

- Click on Comment to provide comments related to the goal. Include success and/or obstacles

- Click on the Add button to add next Goal
Position Description Review*

Does your position description accurately reflect your major responsibilities? If not, list changes in the comments box below.

Employee Evaluation

*May obtain copy of position description from your HR Partner
Competencies (see handout)

- Effective Communications
- Job Knowledge
- Producing Results
- Service Excellence
- Honesty & Integrity
- Attendance

Additional Supervisory Competencies

- Leadership
- Cultivating Workforce Diversity
- Staff development
Performance Ratings

1. Click on the Competency to open up the section

Description
Able to express ideas in a clear, concise, and effective manner, whether speaking or in writing. Uses correct grammar and sentence structure in communications. Demonstrates effective listening skills, and openness to differing viewpoints. Openly shares information and keeps all relevant parties updated. Able to effectively tailor communication style to different audiences.

Employee Evaluation

2. Click on the Rating and select from the drop-down menu

3. Click on the Comment box to comment on the competency area. Include areas of success and/or areas of challenge.
Performance Indicators Rating Scale

• **(4) EE** – Exceeds Expectations: Consistently exceeds or far exceeds performance expectations. Highly competent in current role. Role model in current position.

• **(3) CM** – Consistently Meets Expectations: Fully competent and may at times exceed job expectations; makes a valuable contribution to SCU; errors are infrequent and typically detected and corrected by employee.

• **(2) SM** – Sometimes Meets Expectations: Meets performance expectations some of the time; displays inconsistency in the performance and output; at times may fall below performance expectations.

• **(1) NM** - Not Meeting Expectations: Consistently poor or unacceptable performance; does not accomplish most objectives; immediate correction required or possible employment termination.
Main Accomplishments

List up to three main professional or personal accomplishments achieved by the employee related to the position during the current review period.

Employee Evaluation

Comment

Click on the Comment box to enter information. This is a free-text section to include professional and personal accomplishments related to their position not already captured in another section.
Supporting Documents

- Feedback Surveys (360, skip-level)
- Letters
- Email
- Articles

Click Attach to upload documents. If more than one document, scroll down and click Add.
Goals for Next Review Period (min. of 3)

Required - Enter the SMART goal here

(Optional) – Break down the goal into Objectives

Required - Select type of Goal (Development or Performance)

Required - Enter due date. Use 3/31/2021 if unsure

Required – Click on drop down and select a status.

Click on the Add button to add next Goal (min. of 3)
Overall Rating and Overall Commentary

Manager:
Below is the calculated overall rating of the individual competency ratings and the employee's accomplishments and goals met relative to job expectations over the entire review period. In the comments box, please elaborate on performance during this review period.

Manager Evaluation

Overall Rating
(d) EE – Exceeds Expectations

Automatically calculated. To change, must change ratings above.

Overall Commentary

Overall Comments to summarize or address anything not included in other sections
Manager View

Manager Evaluation

Manager Rating

Comment

Employee Evaluation

Employee Rating

(3) CM – Consistently Meets Expectations

Fully competent and may at times exceed job expectations; makes a valuable contribution to SCU; errors are infrequent and typically detected and corrected by employee

Comment

In the manager comment boxes throughout the form, both the 1st level and 2nd level manager will use the same box. Enter your initials and then the comments to indicate who is making the comments.
Steps of the Evaluation Process in Workday

- Employee completes Self-Evaluation
- Supervisor completes Employee Evaluation
- 2nd Level Supervisor reviews and approves
- Supervisor prints out the Evaluation and **meets** with Employee
- Supervisor clicks “submit” in Workday to release the Evaluation to the Employee
- Employee reviews, comments, and acknowledges receipt of the evaluation
- Supervisor review Employee comments and clicks on “acknowledge” to complete the process
2019-2020 Performance Evaluation Timeline

- **Employee** completes Self-Evaluation (2/18 – 2/27)
- **Manager** completes Employee Evaluation (2/27 – 3/12*)
- **2nd Level Manager** reviews and approves (3/12 – 3/19*)
- **Manager** prints out the Evaluation and meets with Employee (3/23 – 3/31*)
- **Manager** clicks “submit” in Workday to release the Evaluation to the Employee (3/23 – 3/31*)
- **Employee** reviews evaluation, comments, and acknowledges receipt of the Evaluation (3/23 – 4/3*)
- **Manager** reviews Employee comments and clicks on “Acknowledge” to complete the process (4/3 – 4/9*)
- Performance Evaluation Complete

* Due by 5pm on date listed
Info and FAQs

• How is the Overall rating calculated? **Overall rating is an average of all ratings**
• Is the Second level manager’s approval required? **Yes, they review prior to meeting with employee**
• When is the process complete? **The process is complete once the supervisor confirms on the “Acknowledgment” page**
• What if the employee or supervisor is on vacation or leave? **Notify HR to work out timelines**
• What if I didn’t supervise the employee for the entire review period? **Work together with 2nd level supervisor to discuss performance.**
• My employee will complete their intro period between Jan 1 and Jun 30. Do I have to complete an annual evaluation too? **No, you do not have to complete two evaluations.**
Resources

• Your HR Partners
  • Sheila Javier – sjavier@scu.edu
  • Vipasha Mahajan – vmahajan@scu.edu
  • Delilah Montoya – dmontoya@scu.edu
  • Liz Quevedo – equevedo@scu.edu
• Shirley Mata – Employee Development, smmata@scu.edu
• Abby Aceron – Employee Relations, aaceron@scu.edu
• **Staff Policy Manual**
  • Section 400, Policy 403: [Performance, Planning and Management](mailto:)
  • Section 200, Policy 202: [Introductory Employment Period](mailto:)
Questions?
Thank you!