



# **Overview of Performance Evaluation Process in Workday**

**Presented by:  
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## Agenda

- ◆ Overview of Performance Management
- ◆ Setting Goals: S.M.A.R.T.
- ◆ SCUs Annual Performance Evaluation Process
- ◆ Workday Performance
- ◆ Best Practices
- ◆ Salary Planning
- ◆ Resources
- ◆ Questions & Answers



## Performance Management

- 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.
- Performance Review is a step in 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.



# Possible Outcomes from Effective Performance Management

- ◆ Clarifies job responsibilities and expectations
- ◆ Develops employee capabilities to their fullest extent through effective feedback and coaching
- ◆ Helps to identify areas of development
- ◆ Drives behavior to align with the SCU and department values, goals and strategy
- ◆ Enhances individual and group productivity
- ◆ Improves communication between employees and managers



# Performance Management Process





## Performance Planning

- ◆ Review and update position description
- ◆ Clarify performance expectations and behaviors
- ◆ Develop SMART goals
- ◆ Identify training and employee development opportunities that grow skill and knowledge related to their work
- ◆ Agree upon monitoring process



## Ongoing Feedback

- ❖ Provide ongoing feedback on progress towards meeting performance expectations and goals
- ❖ Identify any barriers that may prevent the employee from accomplishing what needs to be done
- ❖ Adjust objectives/goals if needed
- ❖ Discuss and review any employee development activities (workshops/articles/on-the-job training)
- ❖ SBI + C (Situation, Behavior, Impact + Change (if needed))



## Review & Evaluation

- ◆ Employee completes a self-assessment
- ◆ Summarize and highlight employee's performance (expectations, SMART goal) over the review period
- ◆ Document challenges encountered and identify areas for training/development
- ◆ New cycle begins





## SMART Goals





# SMART Goals

- ❖ **Specific** - Identify what needs to be accomplished
- ❖ **Measurable** - Establish concrete criteria for measuring progress
- ❖ **Attainable** - Can be achieved in the specific amount of time
- ❖ **Relevant** - Aligned with current tasks and mission of the organization
- ❖ **Time-bound** - Have a clearly defined time-frame or deadline date



## Benefits of Effective Goals

- ◆ Aligns individual work to organization's mission
- ◆ Clarifies the specific expectations of the manager and employee
- ◆ Form a common frame of reference around which the manager and employee can effectively communicate
- ◆ Clearly indicate success, and can cultivate a strong sense of fulfillment for those working toward achieving the goals



# **Annual Performance Evaluation Process**

**April 1, 2023 - March 31, 2024**



## Timeline

- Launch Performance Evaluations in Workday - 3/13/2024
- Self Evaluation - Complete by 4/1/2024 by 5:00 pm
- Manager Evaluation - Complete by 4/19/2024 by 5:00 pm
- Second Level Manager Approval - complete by 4/26/2024 by 5:00 pm
- Managers Meet with Employee - complete by 5/10/2024 by 5:00 pm
- Employee and Manager Acknowledgements - complete by 5/17/2024



# Eligibility for Annual Performance Review

- Benefits-Eligible Staff
- Non-union Employee
- Completed Introductory Period prior to 1/1/2024
- Fixed-Term Employee in regular funded position



## Guide for Self Appraisal

- ◆ What are your most important accomplishments and achievements since your last review?
- ◆ Has the past year been better or worse for you than previous years in this position?
- ◆ Have you achieved the goals set during your previous review?
- ◆ Have you surpassed any of your goals?
- ◆ Are you struggling with any goals? Which ones? What's hindering you from achieving them?
- ◆ What do you hope to achieve in the upcoming year?
- ◆ What can your manager or organization do to better help you succeed?



## Workday Performance Evaluation Sections

- **Results Achieved** (Goals for rating period, e.g. 4/1/2023 - 3/31/2024) – update status
- **Position Description** – Comments
- **Performance Indicators** - Competency Ratings, Comments
  - Effective Communications
  - Job Knowledge
  - Producing Results
  - Service Excellence
  - Honesty & Integrity
  - Cultivating Workforce Diversity
- **Main Accomplishments & Areas of Struggle**
- **Supporting Documents** (Optional)
- **Goals for Next Review Period** (April 1, 2024 – March 31, 2025)
- **Overall Supervisor Rating** (Comments)
- **Acknowledgements**





## Results Achieved (Goals set last performance cycle)

**Goal \***

Format | B | I | U | A | [List Icon] | [Link Icon]

Enter the SMART goal here (required)

**Goal Objectives**

Format | B | I | U | A | [List Icon] | [Link Icon]

(Optional) – Break down the goal into Objectives

**Category**

☐ Development  
☒ Performance

Select type of Goal – Development or Performance

**Due Date**

MM / DD / YYYY [Calendar Icon]

Enter original due date.

**Status**

select one

select one  
Not Started  
In Progress  
Off Track  
Completed  
No Longer Applicable

Click on drop down and select a status.

**Employee Evaluation**

**Comment**

Format | B | I | U | A

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

**Add**

Click on the Add button to add next Goal



## Position Description Review

### Question

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

### Employee Evaluation

Rating \*

select one ▼

select one

Yes

No

🔗

↕



## Performance Indicators

**Required:** Assign a rating for each competency area. For any indicators rated as NM-Not Meeting Expectations, enter the specific causes to justify the rating in the comments section and consult HR. Performance Rating Scale Descriptions may be found [here](#).

**Optional:** Enter comments as appropriate in the space provided.



6 items

1 Select a rating from the drop-down menu

Competency	Description	Employee Evaluation
Effective Communications	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.	<div><div>Rating *</div><div><div><div><input type="radio"/> EE – Exceeds Expectations</div><div><input type="radio"/> CM – Consistently Meets Expectations</div><div><input type="radio"/> SM – Sometimes Meets Expectations</div><div><input type="radio"/> NM - Not Meeting Expectations</div></div><div>Search</div></div></div> <div><div>Comment</div><div></div></div>

2. (Optional) Click on the Comment box to add comments. Include areas of success and/or areas of development.



## Performance Indicators

Effective Communications  
Job Knowledge  
Producing Results  
Service Excellence  
Honesty & Integrity  
Cultivating Workforce Diversity

Additional Supervisory Competencies:

Leadership  
Staff Development



## Competency Rating Scale

**EE - Exceeds Expectations:** Consistently exceeds or far exceeds performance expectations. Highly competent in current role. Role model in current position.

**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

**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

**NM - Not Meeting Expectations:** Consistently poor or unacceptable performance; does not accomplish most objectives; immediate correction required or possible employment termination



## Main Accomplishments

**Question** List main professional or personal accomplishments achieved by the employee related to the position during the current review period. You may use this section to identify areas of struggle during the review period.

### Employee

**Comment**

Format

▼

**B**

*I*

U

**A**

▼

☰

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**This section allows for free-text to highlight areas of professional and personal accomplishments not captured in other areas. May also include areas of struggle during this review period.**



## Goals for Next Review Period

**Goal \***

Format **B I U A** [List Icon] [Link Icon] [Expand Icon]

Required - Enter the SMART goal here

**Goal Objectives**

Format **B I U A** [List Icon] [Link Icon] [Expand Icon]

(Optional) – Break down the goal into Objectives

**Category**

☐ Development  
☐ Performance

Required - Select type of Goal (Development or Performance)

**Due Date**

MM/DD/YYYY [Calendar Icon]

Required - Enter due date. Use 3/31/2025 if unsure

**Status**

select one

select one  
Not Started  
In Progress  
Off Track  
Completed  
No Longer Applicable

Required – Click on drop down and select a status.

**Add**

Click on the Add button to add next Goal (min. of 3)





You may attach any supporting documentation to this evaluation.



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

## Employee

Drop files here

or

Select files

Click **Attach** to upload documents. If more than one document, scroll down and click **Add**. When done, click **Next**.





## Supervisor Overall Rating and Overall Commentary

Enter the overall rating for the employee based on all information provided for the 2020-21 performance evaluation period. In the Comment box, please provide any additional comments or summarize employee performance during this review period.

For detailed description of each of the ratings, go to [www.scu.edu/hr/workdayatscu](http://www.scu.edu/hr/workdayatscu), scroll down to Talent and Performance and click on **Performance Rating Scale Descriptors**



### Manager Evaluation

Overall Rating \*

select one ▼

select one

EE – Exceeds Expectations

CM – Consistently Meets Expectations

SM – Sometimes Meets Expectations

NM - Not Meeting Expectations

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**Use Overall Comments box to summarize or address anything not included in other sections**



## Manager View

Competency	Description	Manager Evaluation	Employee Evaluation
Effective Communications	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.	<p>Rating</p> <div></div> <p>Comment</p> <div></div>	<p>Rating</p> <p>CM – Consistently Meets Expectations</p> <p>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</p> <p>Comment</p> <div></div>

**In the manager comment boxes throughout the form, both the 1<sup>st</sup> level and 2<sup>nd</sup> level manager will use the same box. Enter your initials and then the comments to indicate who is making the comments**



# Workflow

- 1. Employee complete self-evaluation**
- 2. Manager completes evaluation**
- 3. 2nd Level manager reviews and approves**
  - a. If overall rating is not meeting expectations, HR reviews
- 4. Manager meets with employee and releases evaluation**
- 5. Employee acknowledges receipt of evaluation and provides comments**
- 6. Manager acknowledges receipt of any comments**



## Best Practices on Performance Evaluation Process:

- ◆ This is a summary of your employee's performance throughout the year
  - Schedule check-ins! Nothing in the evaluation should be a surprise
- ◆ Documenting your impressions
- ◆ Gathering necessary materials, including your employee's self appraisal and 360-degree or skip-level feedback
- ◆ Finding a suitable time and place for the meeting
- ◆ Setting the right tone during discussion
- ◆ Offering feedback that the recipient can use to grow
- ◆ Defining next steps, including setting goals and creating a development plan
- ◆ Following up with your direct report
- ◆ Assessing your effectiveness in the appraisal process



## FAQs

- Who is the second level supervisor?
- What if the employee or supervisor is on leave?
- What if I didn't supervise the employee for the entire review period?
- Are reviews required for fixed term employees?
- What if employee completed their introductory period after Jan 1, 2024?



## What is Staff Salary Planning?

- ❖ The application of a merit increase to individual staff members based on their job performance.
- ❖ Eligibility
  - Regularly funded positions
  - Employees not in the intro period
  - Non-union employee
- ❖ How is the merit pool allocated?



## Resources

- ❖ Workday Performance resources are available in **Workday** in the PERFORMANCE app



Performance

### External Links

[Performance Evaluation Overview](#)

[Performance Rating Scale Descriptors](#)

[SMART Goal Template](#)

[Employee Evaluation Guide](#)

[Manager Evaluation Guide](#)

[Send Back a Performance Evaluation Guide](#)

[Performance Evaluation FAQ's](#)

[Reviewing Individual Goals](#)

- ❖ To view evaluations, Workday Search: **“Team Performance”**
- ❖ **Policy 202 - Introductory Employment Period**
- ❖ **Policy 402 - Performance Planning and Management Statement**



## Resources (cont'd)

Email: [EmployeeDevelopment@scu.edu](mailto:EmployeeDevelopment@scu.edu)

Contact your **HR Partners**

- **Aryana Alvarez:** [a2alvarez@scu.edu](mailto:a2alvarez@scu.edu)
- **Jean Griffin:** [jgriffin@scu.edu](mailto:jgriffin@scu.edu)
- **Sheila Javier:** [sjavier@scu.edu](mailto:sjavier@scu.edu)
- **Abby Acheron Molina:** [aacheron@scu.edu](mailto:aacheron@scu.edu)
- **Delilah Montoya:** [dmontoya@scu.edu](mailto:dmontoya@scu.edu)
- ◆ **Shirley Mata:** [smmata@scu.edu](mailto:smmata@scu.edu) - Employment Development (training and development, coaching, team building, etc)





## Questions?