





Overview of Performance Evaluation Process in Workday

Presented by: Shirley Mata





- 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 <u>managers</u> and <u>employees</u> work together to <u>plan</u>, <u>monitor</u>, and <u>review</u> 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
- ★ <u>Time-bound</u> 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



- 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

Additional Supervisor Competencies:

Job Knowledge

Leadership

Producing Results

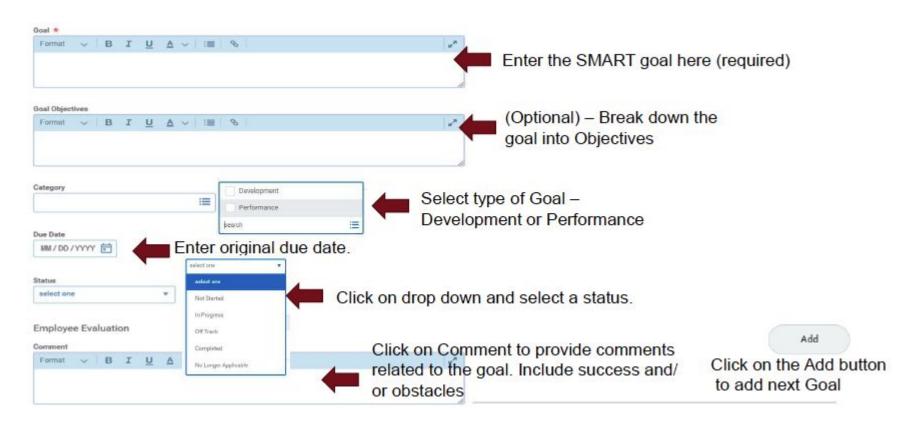
- Staff Development

- 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)







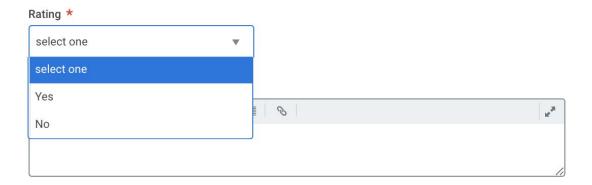


Position Description Review

Question

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

Employee Evaluation







Performance Indicators

<u>Required:</u> 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	EE - Exceeds Expectations CM - Consistently Meets Expectations
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.	Rating * Comment	SM - Sometimes Meets Expectations NM - Not Meeting Expectations Search
		· · ·	k on the Comment box to add comments 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

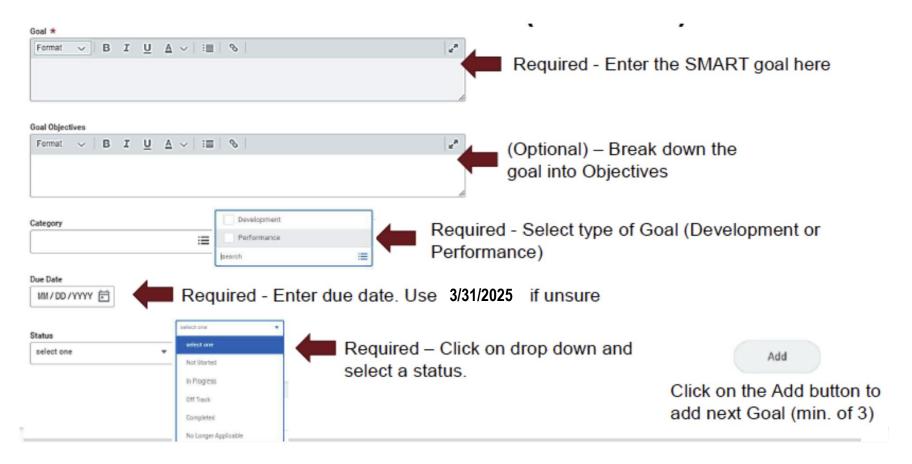
Comment



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

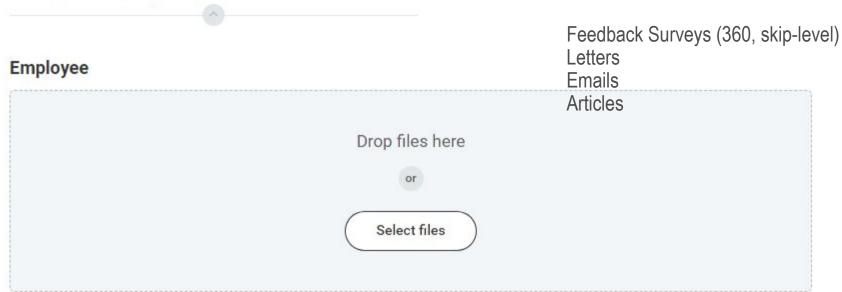




JARA (1)

SANTA CLARA UNIVERSITY

You may attach any supporting documentation to this evaluation.



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



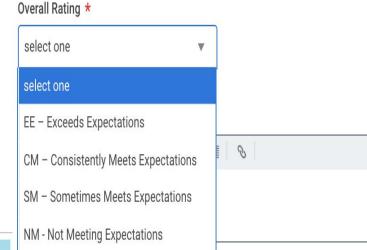


Supervisor Overall Rating and Overall Commentary

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.

Manager Evaluation

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



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.	Rating Comment	Rating 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





- 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





- 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?

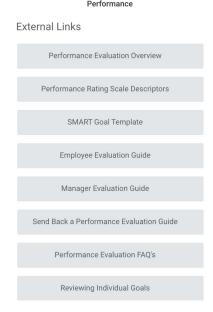
- The application of a merit increase to individual staff members based on their job performance.
- Eligibility
 - Regularly funded positions
 - > Employees <u>not</u> in the intro period
 - Non-union employee
- How is the merit pool allocated?





Resources

Workday Performance resources are available in Workday in the PERFORMANCE app



- 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

Contact your <u>HR Partners</u>

- Aryana Alvarez: <u>a2alvarez@scu.edu</u>
- > Jean Griffin: jgriffin@scu.edu
- > Sheila Javier: sjavier@scu.edu
- > Abby Aceron Molina: aaceron@scu.edu
- Delilah Montoya: dmontoya@scu.edu
- Shirley Mata: smmata@scu.edu Employment Development (training and development, coaching, team building, etc)







Questions?

