Performance Review Workshop
WELCOME!

TODAY’S PRESENTERS:
Liliana Rojas – Director, Employee Relations & Professional Development
Mara Krasts – HR Project Manager
AGENDA

• Workflow and Updates
• Preparing for Performance Reviews
• Breaking it Down – Taking a Deeper Look at the Template
• SMART Goal Method
• Thinking Ahead for Next Year
• Additional Resources
• Questions
Workflow Reminders: 2023 Appraisals

- There are no changes to the non-union appraisal template or ratings for 2023.
- The process will launch on Jan. 3, 2024, as previously communicated.
- Your direct reports will have until Jan. 17 to complete their self-appraisals.
- Once direct reports complete and submit their appraisals, you will automatically receive a Workday inbox notification to complete a review.
- Once the review is approved you will schedule a 1:1 with your employee.
- REMINDER: The Manager’s Manager cannot edit the submitted appraisal.
- IMPORTANT: *Do Not Submit the final appraisal until after your 1:1*
Sample Self-Appraisal in Workday

• **Reminder:** Employees can save their work and finish later
• **New for 2023** – users can attach documents to performance appraisals
• Content from a Word document can be copied and pasted into the Workday template
Non-Union Appraisal Template

Part 1: Accomplishments - Please enter 3-5 accomplishments from the previous appraisal period based on your 2023 goals and objectives. Please include at least one example of how the accomplishment supported USF’s mission, vision and values.

Part 2: Professional Strengths - Please identify 3 professional strengths.

Part 3: Development - Please identify 3 areas for further development.

Part 4: Goals and Objectives - Please enter 3 goals or objectives you would like to accomplish for the upcoming year. Please ensure that one of your goals or objectives supports USF’s mission, vision and values.
Overall Ratings

• **Sets a new standard:** Consistently exceeds expectations and delivers beyond the goals of the role. Influences others to perform better.

• **Often exceeds expectations:** Regularly exceeds expectations. Requires little to no additional direction.

• **Consistently meets expectations:** Consistently meets expectations. Achieves a majority of the goals for the role.

• **Needs development:** Does not consistently meet expectations. One or more of the goals were not achieved. Additional direction and support are needed.
Preparing for Performance Appraisals
Regular one-on-one meetings throughout the year provide an opportunity for continuous feedback and avoids any surprises at review time.
Preparing for Performance Appraisals

- Review your notes from one on ones and formal discussions; you should have meaningful comments to record. There should be no surprises.
- Thoughts about how this role supports the department goals and how this employee fulfilled their role
- Thoughts about development; what are this employee’s opportunities?
- Job description; read and review and update if required (Compensation)
- Familiarize yourself with the ratings; what does “consistently meets expectations” look like for your department or division?
- Make this a meaningful conversation; don’t just copy/paste your employee’s self-appraisal!
Setting the Stage for a Successful Review

• Schedule time in a private room or Zoom
• The supervisor and employee should come to the conversation prepared to review the employee’s self-appraisal and the approved manager’s appraisal in Workday
• Manager starts with employee self assessment then moves on to their assessment of the employee’s performance; this is a two-way dialogue
• Manager shares the Overall Rating with the employee
• IMPORTANT: The Overall Rating cannot be changed once the manager’s manager has approved
Breaking it Down

- Accomplishments
- Professional Strengths
- Development
- Goals and Objectives
Accomplishments

• Projects the employee completed on time and in which their participation played a great role
• Projects to which the employee contributed more than was expected from them
• All additional tasks the employee undertook; how did they flex their role?
• Courses or trainings the employee completed
• Did they achieve the goals and objectives set for 2023?
Professional Strengths

A strength is "the ability to consistently provide near-perfect performance in a specific activity."

–Gallup, "How Employees' Strengths Makes Your Company Stronger"
Examples of Professional Strengths

• Builds strong relationships / is empathic / seeks diverse perspectives / includes others in decision-making / is collaborative
• Shares information / helps others learn and develop / attends to own learning / puts learning to use / uses resources
• Embraces change / leads change / is adaptable
• Inspires others / shares vision
• Thinks critically / makes good decisions / supports reasonable risks / learns from mistakes / thinks strategically / effectively analyzes situations and data
• Communicates clearly / shares ideas and solutions / listens actively
• Is accountable / encourages accountability in others / is responsible
Development

• It’s important to know your opportunities for your professional growth
• Thinking about areas for improvement should be a positive, growth-oriented experience instead of a negative view of an employee’s current skillset.

**Common areas for improvement at work:**

- Policy & Procedure
- Active Listening
- Accepting Feedback
- Written Communication
- Delegation
- Attention to Detail
- Organization
- Teamwork
- Flexibility
- Decision-making
- Conflict Resolution
- Leadership
Goals and Objectives

A goal is an outcome you want to achieve; an objective is a specific and measurable action that can be reached in a short amount of time, related to a goal.

GOALS: Broad statement
• Setting goals can provide motivation and allows your employee to show how they aim to improve in their position and contribute to your department.
• Common types of goals: Productivity, Skills, Training, and Achievement-Based goals
• SMART goals

OBJECTIVES: Defines measurable actions to achieve an overall goal
• Specific actions and measurable steps that the employee must take to achieve a goal.
• Strong objectives are specific, measurable, achievable, realistic and time-bound.
SMART Goal Method
SMART Goal Method

**Specific:** What will be accomplished? What actions will the employee take?

**Measurable:** What data will measure the goal? (How much? How many? How well?)

**Achievable:** Is the goal doable? Does your employee have the necessary skills and resources?

**Relevant:** How does the goal align with broader goals? Why is the result important?

**Time-Based:** What is the time frame for accomplishing the goal?
Performance Management Best Practices
An Ongoing Process

- Hold regular 1:1 meetings with direct reports and take detailed notes
- Hold a mid-year check-in
- Provide regular feedback
- Iterate as goals or objectives change
Performance and Development Feedback

Two way conversation:
- Both parties noting what’s working, what’s not
- Both parties participating in problem solving any issues
- Both parties working at any iteration

Start with the positive:
- Creates safety
- Provide specific examples of areas for development
- Move to “what to do differently” and provide support
- Conclude with expression of confidence

Take notes – you’ll want these as you prepare for next year’s reviews.
ADDITIONAL RESOURCES

• SMART Goals: USF Goal Setting Guidance
• Giving Feedback
• Employee performance issues should be directed to Employee Relations via the Human Resources inbox
• 10-8 appointments will be available beginning Jan. 3, 2024 through the appointment calendar on your myUSF home page or on the HR home page
THANK YOU!
QUESTIONS?