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**

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Workflow and Updates

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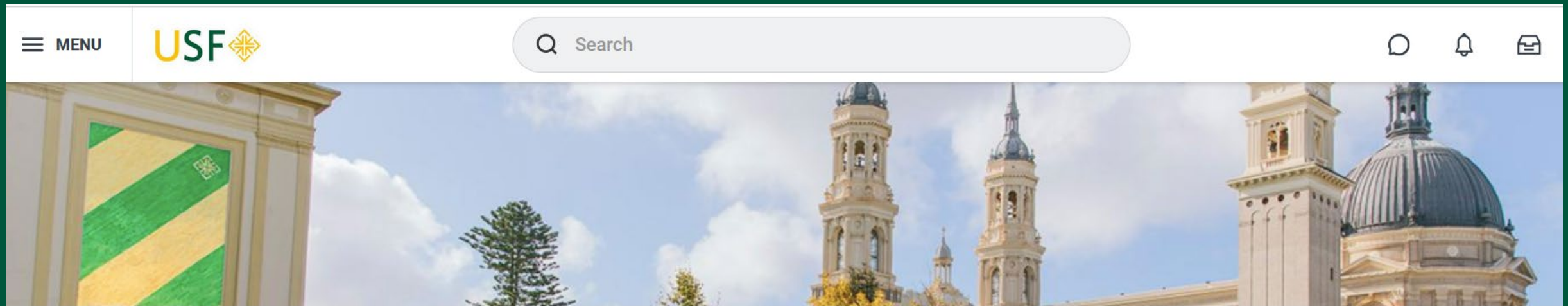
- **Reminder:** Employees can save their work and finish later
- **New for 2023** – users can attach documents to performance appraisals
- Content from a Word document can be copied and pasted into the Workday template

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.

The Performance Review Cycle

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!

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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**

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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	Organization
Active Listening	Teamwork
Accepting Feedback	Flexibility
Written Communication	Decision-making
Delegation	Conflict Resolution
Attention to Detail	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

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?

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

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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.

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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

CONTACT HUMAN RESOURCES

Lone Mountain Main
Room 339
Currently operating remotely

Hours: BY APPOINTMENT ONLY

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SCHEDULE APPOINTMENT

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QUESTIONS?