



Performance Review Workshop

AGENDA

- **Workflow and Timeline**
- **Preparing for Performance Evaluations**
- **Breaking it Down – Taking a Deeper Look at the Template**
- **SMART Goal Method**
- **Thinking Ahead for Next Year**
- **Additional Resources**
- **Questions**



Workflow and Timeline

2024

Review Period Timeline

- **Non-Union evaluations launch Jan. 6, 2025**
- Self-evaluation period Jan. 6-Jan. 24 (3 weeks)
- Manager evaluations Jan. 27-Feb. 21 (4 weeks)
- Manager's Manager Feb. 24-March 7 (2 weeks)
- 1:1 Reviews March 10-March 21 (2 weeks)



2024 Workflow Reminders

- There are no major changes to the non-union evaluation template for 2024.
- Staff on leave will receive an evaluation notification; if they return during the review period, they will have 2 weeks to complete their self-evaluation. The review process will be cancelled if they do not return during the review period.
- Staff hired after Oct. 1, 2024 will only complete the goals portion of the evaluation.
- You will automatically receive a Workday inbox notification to complete an evaluation.
- Once the evaluation is approved you will schedule a 1:1 with your employee.
- REMINDER: The Manager's Manager cannot edit the submitted evaluation.
- IMPORTANT: *Do Not Submit the final evaluation until AFTER your 1:1.*

Non-Union Evaluation Template

Part 1: Accomplishments - Please enter 3-5 accomplishments from the previous review period based on your 2024 goals and objectives. Please include at least one example of an accomplishment that 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.
- **Often exceeds expectations:** Regularly exceeds expectations. Exceeding expectations means an employee demonstrates exceptional contributions beyond the key duties of their role.
- **Consistently meets expectations:** Consistently meets expectations. Meeting expectations means an employee reliably delivers on the key duties of their role and 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 Evaluations

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 Evaluations

- Review your notes from one on ones and formal discussions; you should have meaningful comments to record. **There should be no surprises.**
- Consider how this role supports 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-evaluation!

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-evaluation and the approved manager's evaluation in Workday
- Start with the employee's self-evaluation then move on to your evaluation 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 2024?

Professional Strengths

“Employee strengths are the foundation of organizational success, combining skills, talents, and inherent qualities each individual brings to the table.

These strengths allow employees to excel in areas where they naturally thrive, delivering exceptional results.”

(Culture Monkey, Oct. 8, 2024)



Why Strengths?

Recognizing employee strengths creates a ripple effect, leading to improved job satisfaction, higher engagement, and stronger team cohesion.

Strengths

- Dedicated
- Creative
- Flexible
- Resourceful
- Problem-solving skills
- Ability to work under pressure
- Time management skills
- Team player
- Fast learner
- Leadership skills
- Typing skills
- Writing skills
- Determination
- Negotiation skills
- Communication skills

Examples of Professional Strengths

- **Emotional intelligence:** Understanding and managing emotions helps build strong relationships and resolve conflicts smoothly.
- **Communication skills:** The ability to convey ideas clearly and concisely, both verbally and in writing, is essential for collaboration and information sharing.
- **Flexibility and adaptability:** Employees who can adapt quickly and easily to any shifts in the workplace.
- **Leadership:** Not confined to titles; inspires others, encourages team members
- **Critical thinking:** Ability to weigh the pros and cons of various options, identify potential risks, and make well-reasoned decisions.
- **Accountability:** Someone who is responsible and encourages accountability in others

Development

- It's important to know your employee's opportunities for 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?

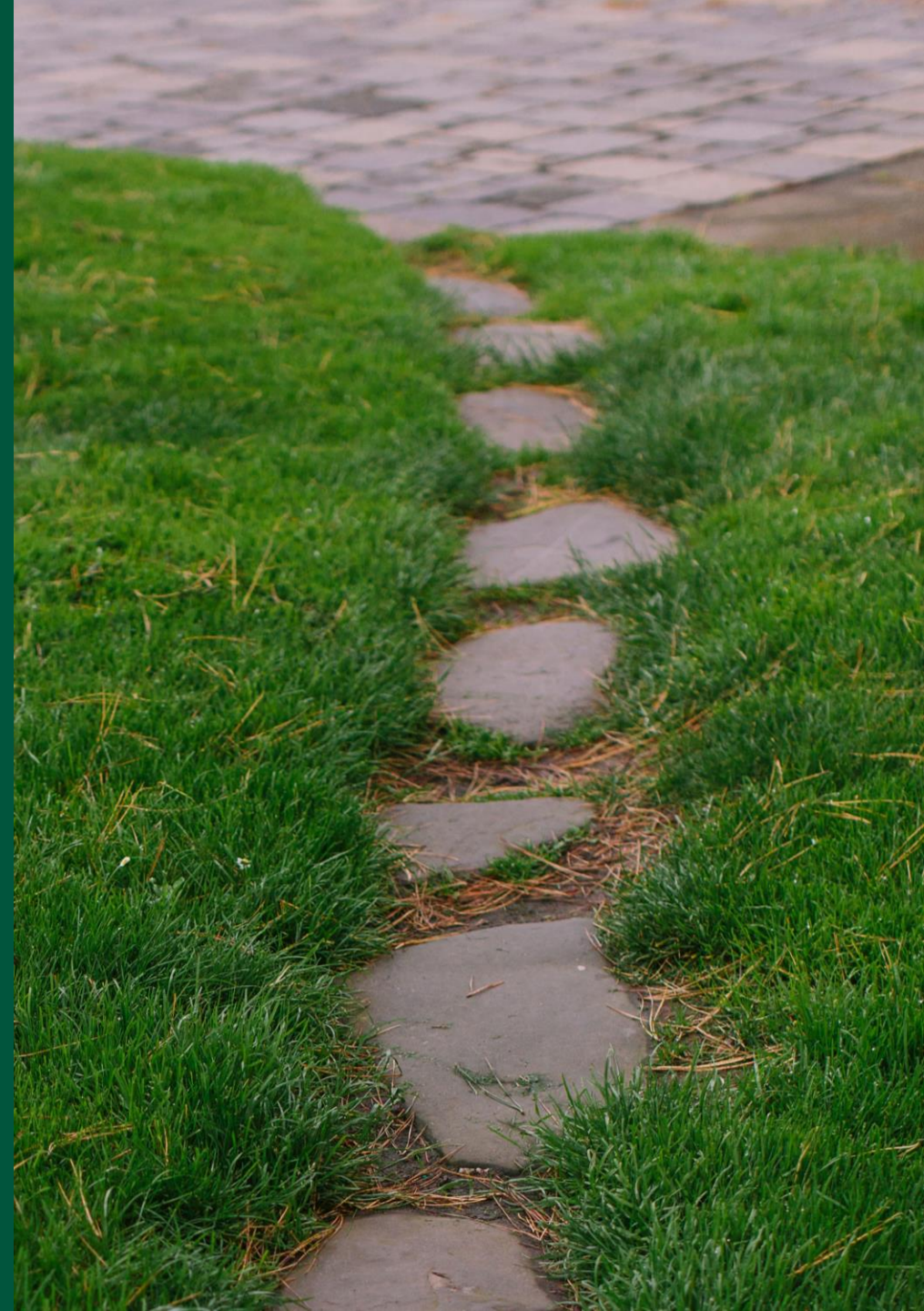
Time-Based: What is the time frame for accomplishing the goal?



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
- Revise 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 iterations

Start with the positive:

- Creates safety
- Provide specific examples of areas for development
- Move to “what to do differently” and provide support
- Conclude with an 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. 6, 2025 through the appointment calendar on your myUSF home page or on the HR home page

CONTACT HUMAN RESOURCES

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Currently operating remotely

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[SCHEDULE APPOINTMENT](#)



THANK YOU!

QUESTIONS?
