



# OPE Manager Performance Review Workshop

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# AGENDA

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



# Workflow and Timeline

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# 2025 Review Period Timeline

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- OPE evaluations launch March 10
- Self-evaluation period March 10-28
- Manager evaluations March 31- April 25
- Manager's Manager April 28-May 9
- 1:1 Reviews May 12-23



# 2024 Workflow Reminders

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- There are no changes to the OPE appraisal template for 2024.
- The process will launch on March 10, as previously communicated
- Your direct reports will have until March 28 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*



# Preparing for Performance Evaluations

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# Preparing for Performance Evaluations

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- 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*)
- Make this a meaningful conversation; don't just copy/paste your employee's self-appraisal!

# OPE Evaluation Form

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1. What were your major accomplishments during the past year; be as specific as possible:
2. List your job-related strengths; please give examples of how you utilized these strengths during the past year:
3. Identify any difficulties or problems encountered in the workplace and actions you took to overcome these difficulties or problems:
4. Identify any job-related weaknesses or areas where you believe additional development is needed:
5. What are your professional goals and objectives for the next year at USF :
6. What resources can be provided which would assist you in meeting future goals/objectives:
7. Are there any additional comments, observations or suggestions you care to make which would help your supervisor and the University evaluate your job performance?



# Setting the Stage for a Successful Review

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- 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
- Manager starts with employee self assessment then moves on to their assessment of the employee's performance; this is a two-way dialogue
- **IMPORTANT: The evaluation cannot be changed once the manager's manager has approved**



# Breaking it Down

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# Accomplishments

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- Did they achieve the goals and objectives set for 2024?
- 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

# Professional Strengths

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“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?

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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

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- **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

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- 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

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# 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

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# An Ongoing Process

- Hold regular 1:1 meetings with direct reports and take detailed notes
- Hold a mid-year check-in; required for OPE members
- Provide regular feedback
- Iterate as goals or objectives change



# Performance and Development Feedback

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## 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 \(video\)](#)
- Employee performance issues should be directed to Employee Relations via the Human Resources inbox
- 10-8 appointments will be available beginning March 10 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**

[\(415\) 422-6707](tel:(415)422-6707)  
 [\(415\) 386-1074](tel:(415)386-1074)  
 [humanresources](mailto:humanresources)

[SCHEDULE APPOINTMENT](#)



**THANK YOU!**

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