

Evaluating Others

Holding Performance Conversations

Quarterly Check-in

Performance Review and Planning

- Review Job Requirements
- Major Contributions or Accomplishments
- Obstacles to Effective Job Performance
- Objectives and Future Plans

Competencies

- Respect for Others and Awareness of their Rights
- Stewardship
- Continuous Learning and Development
- Integrity

Job Responsibilities

(Sample listing)

- 30% - customer service
- 30% - reporting
- 30% - program administration
- 10% - other duties as assigned

Start, Stop, Continue

- Start doing
- Stop doing
- Continue doing

Use the Three Cs model to give regular and effective feedback prior to evaluations:

CONTEXT

- Plan the message you want to convey.
- Provide **feedback “just in time”**: if too much time has gone by, the details will be harder to recall and feedback less effective as a result.
- Ensure recipient is not preoccupied.
- Try to **balance the feedback**: refer to successful and unsuccessful behavior.

COMMUNICATE

- Feedback must be honest and helpful.
- **Be specific** and give a recent example.
- Be descriptive, not evaluative.
- Relate feedback to behaviors that can be changed.

CONFIRM

- Solicit **employee’s thoughts** on the feedback.
- **Confirm recipient understands** and accepts the feedback.
- Clarify if not understood; try another example.

Common Errors in Decision Making to Avoid

Similar-to-Me

Halo/Horn

Contrast

Length of Service

Recency

Leniency/Strictness

Supervisor: Writing Employee Performance Review

Block off time to
write quality reviews
for each employee

Read the employee's
self-evaluation

Provide specific and
actionable feedback beyond
the self-evaluation

Focus on the work
(not personal or health events)

Employee & Supervisor - Hold Performance Conversation

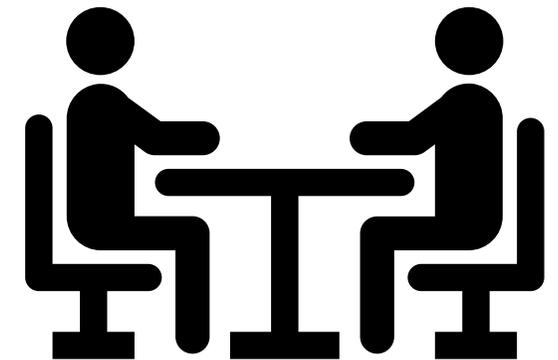
Backwards

- Performance over past calendar year
- Specific examples, actionable recommendations, next steps

Forwards

- Objectives and future plans
- Goals for current calendar year

A two-way conversation



Best Practices

Do

- Assess performance through the entire review period
- Be objective with specific examples
- Leverage Workday training resources to complete the steps in the system

Don't

- Surprise with feedback given the first time during the review
- Reference situations arising outside of work performance (i.e., complaints filed, disabilities, medical conditions)
- Reference an employees approved leave (i.e., annual, sick, FMLA, ADA, Worker's comp, etc.)

Evaluating Yourself

Tips for Self-Evaluations & Goal Setting

Self – Write Self-Evaluation

Prep

- Track accomplishments
- Consider last year's goals
- Seek feedback/check-in with peers
- Gather examples
 - Outlook

- Block time on your calendar to reflect
- Consider your unique strengths
- Think about the future (goals and aspirations)

Self – Write Self-Evaluation

Write

- Block time on your calendar to write w/o interruption
- Gather writing examples
- Try to incorporate qualitative AND quantitative supporting examples

- Consider ways to reflect on last years goals
- Balance your strengths and growth with growth opportunities
- Write objectively, clearly, and concisely

SMART Goals

Goals

- Specific
- Measurable
- Achievable
- Relevant
- Timely

Frame goals to be SMART

Use SMART goals

S Specific

Be specific about what you want to accomplish. Think about **who** needs to be involved, **what** you're trying to accomplish, and **when** the goal should be met.

M Measurable

Set **metrics** that will help you to determine whether the goal has been reached.

A Achievable

Ensure that you have both the **organizational resources** and employee **capability** to accomplish the goal.

R Relevant

Goals must **align with broader organizational and departmental goals** to be meaningful.

T Time Bound

Provide a **realistic target date** to ensure the goal is achievable and assign a timeframe to strive toward.

Examples:

“Learn Excel this summer.”

- **Problems:** not specific enough, not measurable enough (what does “learn Excel” mean?), not time bound.

*“Acquire **a few more** program collaborators by the end of the summer.”*

- **Problems:** not specific (what does “a few more” mean?) or measurable.

*“Start a professional development **program** this year.”*

- **Problems:** not specific enough; what will the program include?

Whether or not a goal is achievable or relevant will depend on context.

For example, the above goal may fail to be achievable if it's **not currently a strategic priority** for the organization.

SMART goal:



*“Consult with a team Excel expert and **take the lead** on creating an Excel data presentation on pivot charts **in August.**”*



*“Acquire **five** new program collaborators **by June 30.**”*



*“Connect with team to discuss learning interests and needs **by next month**, and schedule a deadline for **two** individual courses **by May 30th**”*

Practice building SMART goals

Get more people
registered to our program.

Use SMART goals

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Practice building SMART goals

Find more ways to receive
feedback.

Use SMART goals

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Practice building SMART goals

Shorten our general
meetings.

Use SMART goals

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Summary

- Performance Reviews are one part of the performance management process
- While anchored in the annual performance review, start to shift towards on quarterly conversations
- Check your e-mail and Workday inbox for important information