Agenda

Why Make Changes
- Consistent System Across USG
- Integrate with Careers Module in OneUSG
- Performance Differentiation/Accountability
- BOR requirements for performance evaluations

Overview of New Process – What’s changed?
- New Rating Scales
- Standard Behavioral Rating Scales
- Mid-year check-ins
- Ability to nominate others to provide input
- SMART Goals

Implementation Timeline
Communication/Training Plan
What is Careers?
‘Careers’ is an umbrella term representing the conglomeration of job openings, applications, employee on-boarding, and employee performance reviews.
Careers Module Breakdown

- **Recruitment**: Create and Manage Job Openings and Postings. Manage Applicants (Job Offers, Manage Hires, etc.)
- **Profile Management**: Create and Manage Non-Person Profile (Job Descriptions). Link job descriptions with Recruitment, Onboarding, and ePerformance modules.
- **On-Boarding**: Allow New Employees to Complete New Hire Paperwork. Provide a Standard Orientation Experience to New Employees.
- **ePerformance**: Self-service Evaluation management application for managers & employees.
Performance Differentiation

- Objectively measure performance
- Allows managers to identify and potentially reward top performers
- Requires honest, open feedback
- Provides managers with tools to improve performance
- If done well, improves employee engagement
Overview of e-Performance
Performance Discussions

What’s different from prior years?

• Five-point performance rating scale
  – Better differentiate performance
  – Focus on descriptive performance ratings
  – Standardized rating scale
  – Behaviorally Anchored Rating Scale (BARS)

• Option of nominating additional evaluators to provide input

• Optional mid-year checkpoints to facilitate discussion

• Additional sections for goals, USG core values and institutional values
Five-Point Rating Scale

*Exemplary
- Outstanding performance that consistently exceeds milestones

Superior
- Good, solid performance that fully meets milestones and on occasion exceeds milestones

Successful
- Good solid performance that meets all milestones. This rating conveys solid, effective performance

Partially Successful/Emerging
- Performance falls short of the minimum criteria and standards of milestones

Not Successful
- Performance in this area is inconsistent and does not meet milestone. Immediate and substantial improvement is needed to address this area

* Reserved for only our highest performers and is subject to final approval by executive leadership.
Five-Point Rating Scale

- Comments are required for all ratings other than a “successful” rating
- Any employee who received an overall rating of “Not Successful” must have a Performance Improvement Plan (PIP) completed and submitted.

Contact your HRBP for assistance with this.
Behaviorally Anchored Rating Scale (BARS)

- BARS compare individual performance against specific examples of behavior that equate to rating scale.
- Helps managers more objectively measure performance of staff.
- Provides clear standards against which employees are rated.
- Results in consistency across large organizations.
- Constructive feedback to help employee improve performance.
Customer Service: The extent to which the employee provides a customer friendly environment and superior service to our clients, patients, coworkers, supervisors, direct reports, faculty and students. The employee resolves customer needs with confirmed satisfaction, responsiveness and outcomes.

<table>
<thead>
<tr>
<th>Rating Scale</th>
<th>Employee - Behavioral Indicators</th>
<th>Manager - Behavioral Indicators</th>
</tr>
</thead>
</table>
| **Exemplary**              | - Ask probing questions to establish customer’s needs that the customer may not have originally considered.  
- Fulfills customers’ needs before deadlines have passed. Put in extra times during crisis situations.  
- Consistently exceeds the quality expectations of the customer. Is willing to go the extra mile to “wow” customers.  
- Actively seeks feedback from customers during progress updates.  
- Follows up after progress completion to ensure satisfaction. | - Uses data to find trends in negative customer interactions and develops alternatives. Uses qualitative data to identify common problems in the delivery of service.  
- Fulfills customers’ needs before deadlines have passed. Put in extra time during crisis situations.  
- Has established a quality guideline above the minimum that would be expected from customers. Constantly delivers beyond this quality guideline and the team consistently performs at a high quality.  
- Encourages others to serve customers with new and creative solutions. Can make appropriate risk calculations when supporting new and innovative strategies.  
- Listens to employees to understand what barriers are in their way. Works to remove employee barriers. Encourages staff to action to deliver high customer service. |
| **Superior**               | - Work behavior related to this competency often exceeds expectations and consistently shows superior accomplishment.  
- Communicate with employee about sustainability of this work behavior and future development opportunities | - Work behavior related to this competency often exceeds expectations and consistently shows superior accomplishment.  
- Communicate with employee about sustainability of this work behavior and future development opportunities |
| **Successful**             | - Asks questions to clarify the customer’s needs.  
- Meets established deadlines.  
- Meets the quality expectations for the deliverables to customers.  
- Actively works to improve outcomes for customers.  
- Informs the customer of progress through the use of formal progress updates. | - Finds ways to solicit the feedback of customers in an ongoing manner. Develops alternatives when customers identify a problem.  
- Completes service commitments on time. Is present during crisis situations.  
- Has established a minimum quality guideline for employees. Consistently meets the minimum quality guideline.  
- Promotes a customer centric environment with direct reports. |
| **Partially Successful/Emerging** | - Work behavior related to this competency occasionally falls below the required level for the position.  
- Often times this occurs for new hires or those with new responsibilities.  
- Improvement in specific areas is required.  
- Performance feedback and efforts to reinforce competency may provide the tools to achieve success | - Work behavior related to this competency occasionally falls below the required level for the position.  
- Often times this occurs for new hires or those with new responsibilities. |
| **Not Successful**         | - Fails to ask clarifying questions in customer service exchanges.  
- Fails to meet the quality expectations for deliverables to customers. | - Fails to recognize negative customer reactions. Does not actively seek the opinion and feedback of customers.  
- Is absent during most crisis situations. Relies on others to meet goals.  
- Does not establish quality work guidelines for employees. Fails to deliver quality deliverables to customers.  
- Does not create customer relationships or establish rapport with the customer. Does not pursue opportunities to grow customer base.  
- Does not promote a customer centric environment with direct reports. |
Prepare for the Meeting

Don’t be Afraid to Confront
– Don’t shy away from tough conversations

Provide a Takeaway
– What are next steps for success

Focus on the Progress
– Goals and expectations discussed prior
– Discussion about progress

*The performance appraisal is part of your responsibility as a leader.*
Roles and Responsibilities

Managers

- Build trusting relationships with employees
- Create opportunities for feedback sessions
- Meet with employees at least quarterly to assess progress and revise goals if necessary
- Make a fair and equitable evaluation decision,
- Provide timely and constructive feedback and ongoing coaching and development opportunities

Employees

- Seek continuous feedback from manager
- Participate in annual conversation regarding past performance
- Document accomplishments and contributions throughout the year
- Determine areas for improvement and potential development opportunities
- Be prepared for the one-on-one performance review meeting
- Seek constructive feedback throughout the year
Preparing for the Evaluation

For 2019 evaluations only:
- 0% weighting on goals
- 0% weighting on institutional values

Approve the criteria (will be important after this year as employee will enter their goals for management review and approval)

Skip checkpoint – did not do mid-year checkpoint

Complete evaluation content approval
Preparing for the Evaluation
### Preparing for the Evaluation

#### Current Documents

<table>
<thead>
<tr>
<th>Name / Job Title</th>
<th>Document Type</th>
<th>Document Status</th>
<th>Period Begin / Period End</th>
<th>Next Due Date</th>
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<tbody>
<tr>
<td>Cyprian Nwagwu, Director, Compensation</td>
<td>USG Annual Review for Leaders</td>
<td>Evaluation in Progress</td>
<td>11/01/2019 to 11/20/2019</td>
<td>11/01/2019</td>
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<td>Amy Phillips, Director, Talent Management</td>
<td>USG Annual Review for Leaders</td>
<td>Evaluation in Progress</td>
<td>01/01/2019 to 11/01/2019</td>
<td>10/02/2019</td>
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<td>Pamela Smith, Manager III</td>
<td>USG Annual Review for Leaders</td>
<td>Evaluation in Progress</td>
<td>01/01/2019 to 10/15/2019</td>
<td>09/15/2019</td>
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<tr>
<td>Jasmin Forts, Talent Acquisition Manager</td>
<td>USG Annual Review for Leaders</td>
<td>Evaluation in Progress</td>
<td>01/01/2019 to 10/15/2019</td>
<td>09/15/2019</td>
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<td>Maxsyn Smothers, Communications Prof III</td>
<td>USG Annual Review for Leaders</td>
<td>Evaluation in Progress</td>
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<td>09/15/2019</td>
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<td>Chaunene Jett, Special Employment Coordinator</td>
<td>USG Annual Review for Staff</td>
<td>Evaluation in Progress</td>
<td>01/01/2019 to 10/15/2019</td>
<td>09/15/2019</td>
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</table>
Preparing for the Evaluation
Preparing for the Evaluation
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Preparing for the Evaluation
ePerformance Sections

Goals*

Performance Factors (competencies and job performance)

Leadership Factors (when appropriate) – evaluates specific leadership/management skills

USG Core Values: Integrity, Excellence, Accountability, Respect

Institutional Values: Student-Inspired, Promise-Fulfilling, True to Ourselves, Elevational, Open, Impact-Generating

*This section allows managers to add content. All other sections are defaulted per template.
Nominate Participants

New system has the ability to request input from others

Manager and employee should discuss and determine appropriate participants

Should be used for those that support multiple people and those that are internal customer facing
Nominate Participants

USG Annual Review for Leaders
Nominate Participants - Add Nominees

Cyprian Nwagwu
Actions

- Job Title: Director, Compensation
- Document Type: KSU Annual Review for Leaders
- Manager: Karen McDonnell
- Period: 11/01/2019 - 12/02/2019
- Document ID: 1382
- Due Date: 12/02/2019

Participant Role: Other
Minimum Required: 9  Maximum Available: 19

Nominations
Currently there are no nominees in your nomination list.

Add Other

Review Participant Evaluations
Due Date: 11/02/2019

Review Self Evaluation
Due Date: 11/02/2019

Complete Manager Evaluation
Due Date: 11/02/2019
Goals

Manager Evaluation - Update and Share

Pamela Smith

Job Title: Manager II
Document Type: USG Annual Review for Leaders
Manager: Karen McDonnell
Period: 01/01/2019 - 10/15/2019
Template: KSU Annual Review for Leaders
Document ID: 1335
Status: Evaluation in Progress
Due Date: 09/15/2019

Employee ID: 905701
Department: 1000415
Location: 430
HRS: Human Resources
Kennesaw State University

Calculate All Ratings
Goals
Performance Factors
Leadership Factors
USG Core Values
Institutional Values
Ethics Compliance
Professional Development
Overall Summary
Sign-off Remarks

Section 1 - Goals

Goals Summary

Manager Rating: 3.00
Employee Rating: 3.00 - Successful

Attachments
No Attachments have been added to this document

Add Attachment

Audit History
Created By: Karen McDonnell
11/11/2019 2:32:38PM
Last Modified By: Karen McDonnell
11/12/2019 11:11:34AM
S.M.A.R.T. Guidelines for Development Planning

✓ Provides the employee achievable development opportunities
✓ Gives guidance on expectations
✓ Provides two-way communication
✓ Provides the employee support
✓ Employee and manager buy-in
✓ Provides possible professional growth
Performance Factors

USG Annual Review for Leaders
Manager Evaluation - Update and Share
Pamela Smith

Actions

Job Title: Manager III
Document Type: USG Annual Review for Leaders
Template: Kennesaw State University Annual Review
Status: In Progress

Manager: Karen McDonnell
Period: 01/01/2019 - 12/31/2019
Document ID: 1336
Due Date: 09/18/2019

Employee Data
Employee ID: 907891
Department: 1064416
Location: 430
HRSS-Human Resources
Kennesaw State University

Calculate All Ratings
Goals | Performance Factors | Leadership Factors | USG Core Values | Institutional Values | Ethics Compliance | Professional Development | Overall Summary | Sign-off Remarks

Section 2 - Performance Factors
Expand | Collapse

Communication

Description: The extent to which employee is proficient and professional in oral and written communication. This includes listening, understanding, reiterating, and following oral or written instructions, asking for clarification when necessary, and providing information to others in a clear, complete and concise manner.

Manager Rating: 0.00
Manager Comments

Employee Rating: 3 - Successful
Employee Comments

Kennesaw State University
Performance Factors

Section 2 - Performance Factors

- Communication
- Customer Service
- Initiative
- Innovation
- Job Knowledge
- Adherence to University Policies
- Quality of Work
- Interpersonal Relationships
- Reliability/Attendance
- Critical Thinking

Performance Factors Summary

<table>
<thead>
<tr>
<th>Summary Weight</th>
<th>Manager Rating</th>
<th>Employee Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>34%</td>
<td>0.00</td>
<td>3 - Successful</td>
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</table>
Leadership Factors

USG Annual Review for Leaders
Manager Evaluation - Update and Share

Manager: Karen McDonnell
Period: 01/01/2019 - 10/15/2019

Employee ID: 0007891
Department: HRB-Human Resources
Location: 430
Kennesaw State University

Employee Data

Calculate All Ratings

Section 3 - Leadership Performance Factors

Organizational Development
Fiscal/Budget Management
Strategic Planning

Leadership Performance Factors Summary

Summary Weight: 33 %
Manager Rating: 0.00
Employee Rating: 3 - Successful

Attachments
No Attachments have been added to this document

Audit History
Created By: Karen McDonnell 11/11/2019 2:32:36PM
Last Modified By: Karen McDonnell 11/12/2019 11:11:34AM
USG Core Values

Manager Evaluation - Update and Share

Manager: Karen McDonnell
Period: 01/01/2019 - 10/15/2019
Document ID: 1335
Due Date: 09/15/2019

Employee Data
Employee ID: 356789
Department: 100456
Location: 030
HRS-Human Resources
Kennesaw State University

Calculate All Ratings
Goals: Performance Factors, Leadership Factors, Institutional Values, Ethics Compliance, Professional Development, Overall Summary, Sign-off Remarks

Section 4 - USG Core Values
Expand ▼ Collapse
Accountability
Integrity
Respect

USG Core Values Summary
Summary Weight: 33% (not less than 33%)
Manager Rating: 0.85
Employee Rating: 3 - Successful

Attachments
No Attachments have been added to this document
Add Attachment

Audit History
Institutional Values
Performance Discussions

Bottom Line: The most important part is the conversation between managers and their employees.

Providing direct, actionable feedback is key to developing skills and behaviors where improvements are needed and sustaining exemplary performance where it already exists. HR team members are available to provide managers and employees support throughout this process.
### Performance Evaluations Process Flow

<table>
<thead>
<tr>
<th>Employee</th>
<th>Manager</th>
<th>Next Level Supervisor</th>
<th>Human Resources</th>
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</tbody>
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**Step 1:** Employee

**Step 2:** Manager

**Step 3:** Next Level Supervisor

**Step 4:** Human Resources

**Step 5:** Next Level Supervisor

**Step 6:** Manager

**Step 7:** Employee

**Step 8:** Human Resources
**Implementation Timeline/Communications**

- **Oct.–Nov. 2019**: Pilot department test
- **Nov.–Dec. 2019**: USG UITS makes necessary changes
- **Nov. 2019**: HRAC Overview of ePerformance and communications/training plans
- **Nov. 2019**: Institution wide announcement
- **Dec. 2019**: Presentations with Cabinet and Shared Governance groups
- **Jan. 2020**: Tool launches
- **28 Feb. 2020 – 2019**: HR Department does institution wide training on using system, developing SMART Goals and performance differentiation using new rating scales and BARS
- **28 Feb. 2020 – 2019**: Evaluations complete
<table>
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<tr>
<th>Date</th>
<th>Location</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>TUES, 12/3</td>
<td>Kennesaw - CC 2007</td>
<td>1:00 PM - 3:00 PM</td>
</tr>
<tr>
<td>WED, 12/4</td>
<td>Marietta - Ballroom A</td>
<td>10:00 AM - 12:00 PM</td>
</tr>
<tr>
<td>FRI, 12/6</td>
<td>Kennesaw – English Bldg 102</td>
<td>11:00 AM - 1:00 PM</td>
</tr>
<tr>
<td>MON, 12/9</td>
<td>Kennesaw – University Rooms</td>
<td>2:00 PM - 4:00 PM</td>
</tr>
<tr>
<td>TUES, 12/10</td>
<td>Kennesaw – HS 1101</td>
<td>9:00 AM - 11:00 AM</td>
</tr>
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<td>TUES, 12/10</td>
<td>Marietta – Q 106</td>
<td>1:00 PM - 3:00 PM</td>
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<td>THURS, 12/12</td>
<td>Kennesaw – HS 1101</td>
<td>2:00 PM - 4:00 PM</td>
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</table>
Assistance

• Job Aids will be published at: hr.Kennesaw.edu

• Contact your HRBP for assistance with the tool, SMART Goals, or Performance Improvement Plans (PIP)
Thank you