ePerformance
OneUSG
Agenda

Reminder of our Changes
- Consistent System Across USG
- Performance Differentiation/Accountability
- BOR requirements for performance evaluations

Overview of Current Process
- Rating Scales
- Standard Behavioral Rating Scales
- Ability to nominate others to provide input
- SMART Goals
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
Performance Discussions

• 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 section for review of 2020 goals; 2021 goals will be required to be documented in the system in March 2021 after current review cycle is closed

• USG core values and combined 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 not required on every Behavioral Indicator for a "Successful" rating.
- Comments are required to support any rating above or below "Successful".
- Any employee who receives an overall rating of "Not Successful" must have a Performance Improvement Plan (PIP) implemented for remediation.

*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 2020 evaluations:
- 0% weighting on goals
- 5% 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 – no 2020 mid-year checkpoint (available after March for 2021)

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

<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>
</tr>
</thead>
<tbody>
<tr>
<td>Cyprian Nwagwu, Director, Compensation</td>
<td>USG Annual Review for Leaders</td>
<td>Evaluation in Progress</td>
<td>11/01/2019</td>
<td>11/01/2019</td>
</tr>
<tr>
<td>Pamela Smith, Manager III</td>
<td>USG Annual Review for Leaders</td>
<td>Evaluation in Progress</td>
<td>10/15/2019</td>
<td>09/15/2019</td>
</tr>
<tr>
<td>Jasmin Forts, Talent Acquisition Manager</td>
<td>USG Annual Review for Leaders</td>
<td>Evaluation in Progress</td>
<td>10/15/2019</td>
<td>09/15/2019</td>
</tr>
<tr>
<td>Maxsyn Smothers, Communications Prof III</td>
<td>USG Annual Review for Leaders</td>
<td>Evaluation in Progress</td>
<td>10/15/2019</td>
<td>09/15/2019</td>
</tr>
<tr>
<td>Chaunene Jett, Special Employment Coordinator</td>
<td>USG Annual Review for Staff</td>
<td>Evaluation in Progress</td>
<td>10/15/2019</td>
<td>09/15/2019</td>
</tr>
</tbody>
</table>

Kennesaw State University
Preparing for the Evaluation
Preparing for the Evaluation
Preparing for the Evaluation
ePerformance Sections

Goals*

Performance Factors (competencies and job performance)

Leadership Factors (when appropriate) – evaluates organizational development, fiscal/budget management and strategic planning

USG Core Values: Integrity, Excellence, Accountability, Respect

Institutional Values: Student-Inspired, Open and true to myself and Impact-generating, Promise-fulfilling and Elevational

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

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

| Participant Role: Other | Minimum Required: 0 | Maximum Available: 19 |

Nominations
Currently there are no nominees in your nomination list.

Add Option
Goals

Manager Evaluation - Update and Share

Pamela Smith

Employee ID: 000123
Department: Human Resources
Location: 430

Goals Summary

<table>
<thead>
<tr>
<th>Goals</th>
<th>Performance Factors</th>
<th>Leadership Factors</th>
<th>USG Core Values</th>
<th>Institutional Values</th>
<th>Ethics Compliance</th>
<th>Professional Development</th>
<th>Overall Summary</th>
<th>Sign-off Remarks</th>
</tr>
</thead>
</table>

- **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 2:32:39PM
- Last Modified By: Karen McDonnell  
  11/12/2019 11:11:34AM
SMART

Specific
Measurable
Attainable
Relevant
Time Based
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

Manager Evaluation - Update and Share

Pamela Smith

Job Title: Manager III
Document Type: KSU Annual Review for Leaders
Template: KSU Annual Review for Leaders
Status: Evaluation in Progress

Manager: Karen McDonnell
Period: 01/01/2019 - 03/15/2019
Document ID: 1336
Due Date: 03/15/2019

Employee Data

Employee ID: 0007891
Department: 1960418
Location: 430
HR: Human Resources
Kennesaw State University

Calculate All Ratings

Goals Performance Factors Leadership Factors KSU Core Values Institutional Values Ethics Compliance Professional Development Overall Summary Sign-off Remarks

Section 2 - Performance Factors

Expand 1 Collapse

Communication

Description: The extent to which employee is proficient and professional in oral and written communication. This includes listening, understanding, rephrasing, 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: 6.00
Manager Comments

Writing Tools

Employee Rating: 3 - Successful
Employee Comments
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>3 - Successful</td>
<td></td>
</tr>
</tbody>
</table>

(not less than 34%)
# USG Core Values

## USG Annual Review for Leaders

**Manager Evaluation - Update and Share**

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

### Employee Data

- **Employee ID**: 3067891
- **Department**: 100416
- **Location**: 101
- **HRS-Human Resources**
- **Kennesaw State University**

### Calculate All Ratings

<table>
<thead>
<tr>
<th>Goals</th>
<th>Performance Factors</th>
<th>Leadership Factors</th>
<th>USG Core Values</th>
<th>Institutional Values</th>
<th>Ethics Compliance</th>
<th>Professional Development</th>
<th>Overall Summary</th>
<th>Sign-off Remarks</th>
</tr>
</thead>
</table>

### Section 4 - USG Core Values

- **Accountability**
- **Excellence**
- **Integrity**
- **Respect**

#### USG Core Values Summary

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

### Attachments

- No Attachments have been added to this document

### Audit History

- Updated by: [Name]
- Date: [Date]
Institutional Values

USG Annual Review for Staff
Checkpoint 1 - Update and Share
before or after you meet with the employee to discuss their progress.
3. Once you have shared your comments and had a discussion select the Complete Checkpoint button to mark this step as complete.

Section 4 - Institutional Values
Institutional Values will be evaluated by: Employee, Manager, Other

- Impact-generating/Promise Fulfilling/Elevational
- Open/True to Ourselves
- Student Inspired

Institutional Values Summary
Section Weight: 5% (not less than 5%)

Audit History
Created By: Ori Thornton 12/21/2020 11:49:48 AM
Approved By: Ori Thornton 12/21/2020 12:05:05 PM
Last Modified By: Ori Thornton 12/21/2020 12:05:05 PM
Overall Summary

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

Manager III
Kennesaw State University

Employee Data
Employee ID: 0067891
Department: 1060416
Location: 1060416
HRS-Human Resources
Kennesaw State University

Section 10 - Overall Summary

Manager Rating
Employee Rating
3 - Successful
Employee Comments

0.00

Kennesaw State University
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>
</tr>
</thead>
<tbody>
<tr>
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</table>
Assistance

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

• Contact your HRBP for assistance
  with the tool, SMART Goals, or
  Performance Improvement Plans (PIP)
Reminder: Inoculate Your Evaluations

• Evaluations often become infected by excuses and emotions
• Stick to the facts
• Truth is like getting a vaccine, it may be uncomfortable, but is meant to protect everyone
Thank you