2022 Performance Evaluations

e-Performance Overview
Agenda

Performance Management Objectives
Who gets an evaluation?
Roles & Responsibilities
Process Flow
Timeline
Evaluation Sections
Determining Ratings
Quick Tips
Performance Management

Employees who have regular and meaningful performance discussions with their managers are:

• more productive

• have more opportunities to do challenging work &

• learn new skills
Benefits of Performance Conversations

Manager

- Improve Engagement
- Demonstrate commitment to success
- Increase retention
- Increase productivity
- Receive feedback

Employee

- Share achievements
- Ask questions
- Review strengths
- Discuss areas for improvement
- Reset expectations

Increase engagement
Increase productivity
Demonstrate commitment to success
Receive feedback

Manager

Employee
Who gets a performance evaluation?

**DO:**
- Full-Time Employees
- Part-Time Employees (20 hours or more)
- Staff
- Hired before August 1\textsuperscript{st}, 2022
- Promotion*

**DO NOT:**
- Employees hired on or after August 1, 2022
- Part-Time (19 hours or less), Temporary and Student Employees
- Faculty receive an evaluation in accordance with the Faculty Affairs process.
Roles & Responsibilities

**Employee**
- Complete self-evaluation – OneUSG
- Seek continuous feedback
- Participate in conversation regarding past performance and accomplishments

**Manager**
- Build trusting relationships
- Create opportunities for feedback
- Listen actively
- Complete all actions within set timelines
- Start goal conversations

**Nominee**
- Ensure timely response
- Give fair and equitable evaluation feedback
- Ensure there are no surprises with evaluation notes
- Document accomplishments and contributions throughout the year

**Second-Level Approver**
- Review manager and employee ratings & comments
- Ensure equity and fairness
- Set division level goals for 2023
Performance Evaluation Process

January
Goal Setting
Employee and Manager review business objectives and define departmental and individual goals.

February
Self Evaluations
Employee completes self-evaluation in e-Performance

March
Year-End Appraisal
Manager and Employee discuss year in review, achievements, areas for future development and new year goals.

April
Goal Approval
“Define Criteria”
Manager enters goals in e-Performance

July
Mid-Year Check-in
“Checkpoint 1”

September
Development Plan
Employee creates Career Development Plan
ePerformance Evaluations Process Flow

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<tr>
<th>STEPS</th>
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1. Manager pushes evaluation to employee
2. Employee complete self evaluation
3. Evaluation goes to manager for review and manager evaluation
4. Manager pushes evaluation to Next Level Supervisor for approval
5. Manager has review meeting with employee
6. Manager pushes finalized review to employee
7. Once Acknowledged by employee, evaluation goes back to manager to complete
8. Evaluation is finalized in HR System

Note: If a manager chooses to get input from a nominee (For example: a former manager or customer), nominator acceptance and completion must be completed at step 3.
Timeline

**January 3, 2023**
Evaluations available for Managers to push through to employees for self-evaluations

**February 1, 2023**
Employee self-evaluations due

**February 15, 2023**
Managers submit evaluations to second-level approvers

**March 1, 2023**
All Evaluations Due
For a Manager to be eligible for a potential merit increase they must have all direct reports evaluations completed

**Jan 3 – Feb 15**
Employee self-evals and manager notes can be entered simultaneously

Manager and employee review evaluations together. Allow time for employees to comment and acknowledge in the system.

**February 1 – 28, 2023**
e-Performance Sections

- Goals*
- Performance Factors
- Leadership Factors
- USG Core Values
- Institutional Values
e-Performance Sections

Performance Factors

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

Leadership Factors

- People Management
- Strategic Planning
- Organizational Development

USG Core Values

- Integrity
- Excellence
- Accountability
- Respect

Institutional Values

- Student Inspired
- Open & True to Myself
- Impact Generating
- Promise Fulfilling
- Elevational
# Ratings

<table>
<thead>
<tr>
<th>Rating</th>
<th>Description</th>
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<tr>
<td><strong>5 - Exemplary</strong></td>
<td>• Outstanding performance that consistently exceeds milestones</td>
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<tr>
<td><strong>4 - Superior</strong></td>
<td>• Good, solid performance that fully meets milestones and on occasion exceeds milestones</td>
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<tr>
<td><strong>3 - Successful</strong></td>
<td>• Good solid performance that meets all milestones. This rating conveys solid, effective performance</td>
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<tr>
<td><strong>2 - Partially Successful/Emerging</strong></td>
<td>• Performance falls short of the minimum criteria and standards of milestones</td>
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<tr>
<td><strong>1 - Not Successful</strong></td>
<td>• Performance in this area is inconsistent and does not meet milestone. Immediate and substantial improvement is needed to address this area</td>
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Tips: Framing Your Conversations

1. Give Balanced Feedback
2. Outline Expectations
3. Encourage Feedback
**Tips: Ask Probing Questions**

Approach your performance evaluations with the goal of stimulating an authentic and mutually beneficial exchange between you and your employee.

### Employee Strengths
- What personal strengths help you do your job effectively?
- What kind of work comes easiest to you?
- What skills do you have that you believe we could use more effectively?

### Areas of Improvement
- What goals or deliverables were you least proud of? Why?
- What 2-3 things will you focus on in the next quarter?
- What can I do to help you better meet your goals?

### Manager – Employee Relationship
- How do you think your role helps the University succeed?
- What are two things I could do differently to help you better?
- What do I do that is most/least helpful for you when it comes to completing your work?
- What are your most important goals for next quarter?
Tips: Performance Phrases

How to write impactful performance phrases:

Performance phrases need to be clear and valuable, and they should provide your employee with actionable feedback. When they meet this criteria, they have a better chance of being useful for both you and your employees.
Tips: Performance Phrases

Before using performance review phrases, it's important to consider examples and the categories they fall under.

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

Click here for USG Performance Factors

Click here for more Performance phrases
Process: Launch Evaluations

Finalize Criteria

Make sure shows as Evaluation In-Progress
Process: Nominate Participants
Process: Self-Evaluations

- Point to your accomplishments
  - Technique: Situation – Behavior – Impact
  - Align your achievements with University goals
- Highlight your teamwork
- Make a list of your struggles and challenges
- Bring it all together
  - Take your time
  - Make an improvement plan
  - Discuss your willingness to learn

Find more tips on writing your Self-Evaluation [here](#)

- *Share this slide & link with your employees*
Click Here for the
Step-by-Step
ePerformance Job Aids
Summary

- **Staff Awards** due March 17, 2023
- How does merit work?
- Contact your HR Generalist or Business Partner for additional assistance
- **Who to Contact – HR**
A person who feels appreciated will always do more than expected.

Anonymous