Best Practices for Preparing Your Own Performance Review

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Presentation Outline

- Process Overview
- WIIFM?
- Best Practices:
  - Self Evaluation
  - Goal Setting
  - Review Meeting
- Tool Refresher
- Next Steps
Performance Management Process

- Goals
- Progress
- Feedback
- Review

YOU ARE HERE
Process Overview

2. Employee completes review form and routes electronically to supervisor via Performance Review tool.
3. Supervisor completes their part of the review form.
4. Supervisor conducts review session with employee.
5. Supervisor electronically routes review form to employee for acknowledgement. (This can be done prior to or following the review session, based on supervisor preference.)
6. Employee electronically signs review, adding optional comments.
7. Review is automatically added to ePersonnel and rating is recorded in HR system.

All CoE reviews must be complete (electronically signed by employee) no later than October 15, 2019.
WIIFM?

- Know how you are doing, how you are valued, how you make a difference
- Career planning & development
- Be an active participant in defining your role & future
- Identify skill gaps & training needs
- Pay for performance
- Learn how to further contribute to the College and the UI strategic plans; ensure alignment
Self Evaluation: Basics

Being a good self evaluator is as critical as being a good performer!

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>Words</td>
<td>Put your achievement and growth into words; use clear examples</td>
</tr>
<tr>
<td>Alignment</td>
<td>Tie to department/College/UI strategies; connect to your goals</td>
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<tr>
<td>Balance</td>
<td>Provide balanced, objective commentary on your work; be accountable</td>
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<tr>
<td>Totality</td>
<td>Consider the whole year; incorporate contributions beyond your role</td>
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<tr>
<td>Future</td>
<td>Focus on plan going forward; manage your career not just your job</td>
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Self Evaluation: COLLECT INFO

- Last year’s review
- Last year’s goals
- Your job description
- Your email (kudos, feedback)
- Committee work
- Projects
- 1:1 notes
- Suggest feedback sources to boss**

- Training – formal, cross, etc.
- Your calendar (meetings, classes, key dates)
- Skills acquired
- Role changes or Org changes
- Universal & Technical competencies
- Reports / data – quantify your work
- CoE Strategic Plan / department goals
- Journal**
Self Evaluation: ASK YOURSELF

■ Do others seek you out for assistance, information or expertise?
■ What did you do that was new in your role this year?
■ Did you learn anything this year?
■ What do you want your next job to be?
■ What are you great at? Do you get compliments/kudos?
■ What do you want to be better at? Any constructive criticism?
■ How do you make a difference for students, research, teaching, etc?
Self Evaluation: POSITIVE EXAMPLES

- I ensure the flow of information between the department and other campus offices is smooth and effective.
- When I problem-solve, I often come up with out of the box or non-traditional methods, demonstrating creativity.
- I keep my customers satisfied by addressing their issues/questions and providing quick turnaround for requests.
- I demonstrate respect for others’ time by scheduling meetings and interfacing with colleagues in accordance with their schedules as much as is feasible.
- I have received feedback from others that they appreciate my ability to quickly connect with new faculty and staff and make them feel comfortable in our work environment.

Self-deprecation Arrogance
Self Evaluation: BALANCED EXAMPLES

■ I am a strong communicator verbally, however I want to further develop my written communication skills.

■ Ensuring results are delivered on time by our team is something I am proud of, but I recognize that focus can come off as insensitive to others. I am working on my leadership style to ensure staff understand the why behind tasks and also that I care about them.

■ One area I have been focusing on is ______. Here is what I’ve done (or will do) to improve....

■ I’m aware that time management is not a core strength of mine. However, I took a course this year on Getting Things Done and continue to consciously work on this area.

■ I am working to build my confidence and assertiveness by finding opportunities to demonstrate the skills and knowledge I have to offer.

Office of Strategic Communication
Goalsetting

**Specific:** Any two observers can recognize what’s done

**Measurable:** Quantitative or observable

**Attainable with a stretch:** Possible but requires extra effort

**Relevant:** Strong “line-of-sight” to business goals

**Time-limited:** Milestones and deadlines
Goalsetting: Writing a SMART Goal

Onboarding

- Goal: Help those joining the department get acclimated.
- SMART goal: Develop and implement an onboarding process for new faculty and staff in the department by May 2020.

Customer Satisfaction

- Goal: Get better customer feedback.
- SMART goal: Improve customer satisfaction ratings in the 2020 survey by at least 10% in aggregate.
I got a text message from our boss.

"Keep up wrk."

What does that mean?

You just got your annual performance review.
Review Meeting

- Come prepared (Pre-read review if provided)
- Demonstrate:
  - Good listening skills & a positive attitude 😊
  - Accountability; willingness to improve
  - Openness to feedback / Professionalism
- Talk both short- and long-term; plan/future-focused
- Ask:
  - How can I help you/the team?
  - What do you see coming as priorities for me/us/the college?
  - Would it be possible to get X so I can be more effective?
  - What feedback do you hear about me from others?
- Give feedback too! Share ideas!
  - Ask questions!
Review Meeting: Feedback Models

B*E*S*T

Behavior Description
Express Thoughts & Feelings
Solicit Input/Suggest Action
Talk About Next Steps

S*B*I

Situation
Behavior
Impact
Let’s Take a Tour
Home Page

This is what you will see the first time you log in.

Click here or here to start a review for yourself or one of your staff.
Inbox

Below are links to create your own review as well as any reviews for direct reports.

Click “Create Review” to generate a review form.
The annual performance review may be started by the employee’s self-review or the supervisor may complete their review first. Both employee and supervisor have the opportunity to review and add comments before the review form is complete. This form will auto-save as you make changes to the performance review.
Competencies

Enter your self evaluation for each competency.
Goals

Provide self evaluation comments about your achievement of goals here
Attachments

You can attach documents here if desired.

Performance Review Documents may be added to provide additional details to this evaluation. Your Org/Department may provide standardized template or additional document requirements that are part of your review. If you are not sure which documents to use, please consult with your supervisor or HR Representative. All uploaded documents have the option to be added to the ePersonnel file once the evaluation is complete.

Drag & drop files here to upload

Current Employee Attachments
KOEBRICK, CATHERINE IRENE has not uploaded any attachments
Write your self evaluation overall comments regarding your performance here. You will also have the opportunity to add comments after the review is finalized when you electronically sign it.
Saving / Submitting

Click here to send review to your supervisor. They can send it back to you for further edits if needed, but you will not be able to see their comments until the review is final.

If you’re not ready to send to your supervisor, click here to Save for later.
Tool Recap

- **Employee**
  - Universal Competencies
  - Goals
  - Attachments (opt.)
  - Overall Performance

- **Supervisor**
  - Universal Competencies
  - Goals
  - Attachments (opt.)
  - Feedback (opt.)
  - Overall Performance
  - Rating

- **Review meeting**

- **Employee Acknowledgement / Signature**
  - Employee Comments (opt.)
  - Date recorded
  - Rating recorded
  - ePersonnel attachment
Next Steps: Timeline

*NOW*  
Staff initiate performance review forms (self evaluation)

By 9/13  
Staff complete their part of review; route to supervisor

By 10/15  
Supervisor completes their part of review

Supervisor routes review to employee

Supervisor & employee meet to discuss review

Employee electronically acknowledges review

Nov-Dec  
College salary planning occurs

1/1/20  
Effective date of any salary increases
Next Steps: Homework!

- Collect Info
- Ask Yourself
- Suggest Feedback Sources
- Create Review Form in Tool
- Brainstorm SMART Goals
- Route to Supervisor by 9/13
- Start a Performance Journal!
HERE'S YOUR ANNUAL PERFORMANCE REVIEW, TINA.

I FOCUSED ON YOUR PERFORMANCE FOR THE PAST TWO WEEKS BECAUSE I DON'T REMEMBER ANYTHING FARTHER BACK.

I WAS ON VACATION FOR THE PAST TWO WEEKS!!!

NO TIME TO CHAT. I NEED TO SPREAD SOME MOTIVATION OVER HERE.
QUESTIONS??

Thank You!