Best Practices for Preparing Your Own Performance Review

Cathy Koebrick, Director of Human Resources
College of Engineering
September 10, 2021
Presentation Outline

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

COMING ON IN...

IT'S PERFORMANCE REVIEW TIME!
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 (in person or virtually) 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 22, 2021.
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.
Click “Create Review” to generate a review form

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

Read last year’s review here
Summary

The top of the form shows the current step of the process
Competencies

<table>
<thead>
<tr>
<th>Universal Competencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Describe efforts you took to ensure the acceptance of diversity in your workplace, fostering positive work relationships and successful results.</td>
</tr>
<tr>
<td>Collaboration &amp; Embracing Diversity: Ability to work with a variety of individuals and groups in a constructive and civil manner while appreciating the unique contribution of individuals from varied cultures, race, creed, color, national origin, age, sex, disability, sexual orientation, and gender identity.</td>
</tr>
<tr>
<td>Share results achieved that demonstrates your willingness to create positive outcomes despite challenges or difficulties.</td>
</tr>
<tr>
<td>Positive Impact &amp; Achieving Results: Ability to utilize existing resources to achieve or exceed department's goals. Supports organizational goals/results. Demonstrates ethical behavior in adverse situations to produce results.</td>
</tr>
<tr>
<td>Provide examples where you delivered in a way that clearly shows your commitment to ensuring excellent customer satisfaction.</td>
</tr>
<tr>
<td>Service Excellence &amp; Customer Focus: Identify areas where customer service needs meet or exceed expectations. Provide examples of excellent service where you demonstrated the ability to effectively transmit and interpret information with internal and/or external customers.</td>
</tr>
</tbody>
</table>

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

Select a File to Upload

Current Employee Attachments
KOEBRICK, CATHERINE IRENE has not uploaded any attachments
Write your OPTIONAL 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.
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
- Learn how to further contribute to the College and UI strategic plans; ensure alignment
- Reflect on and communicate the impact of the pandemic and other changes on you and your work
## Self Evaluation: Basics

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

*It is up to YOU!*
Being a good self evaluator is as critical as being a good performer!

“My performance review says I have trouble accepting responsibility. Is that MY fault?!”
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**
- Journal**

- Training – formal, cross, etc.
- Your calendar (meetings, classes, key dates)
- Skills acquired
- Changes – Role, Org, etc.
- Universal & Technical competencies
- Reports / data – quantify your work
- CoE Strategic Plan / department goals
- BEWARE of the recency effect!
- Impact of COVID
Self Evaluation: ASK YOURSELF

- What accomplishment(s) are you MOST proud of?
- What was new in your role this year?
- Did you learn anything this year?
- What do you want your next job to be?
- Do others seek you out for assistance, info or expertise?
- 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?
- How has COVID-19 impacted your work?
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.
"WHAT IS YOUR WORST FLAW?"

I'M TOO AWESOME
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.
Goalsetting
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

Communication
- Goal: Work on communication skills.
- SMART goal: Complete a training course on Business Writing by the end of FY22 and share with supervisor how learnings will be applied.

Customer Satisfaction
- Goal: Improve customer service.
- SMART goal: Improve customer satisfaction ratings in the 2021-22 survey by at least 10% in aggregate.
WOW. I'M SO EXCITED FOR MY PERFORMANCE EVALUATION TODAY.

SAID NO ONE, EVER.
Review Meeting

- In person or virtual by mutual agreement – use video if virtual
- Arrive prepared
  - Pre-read review if provided
  - Have talking points (success examples, questions for supervisor, goals/asks/needs for coming year)
- Demonstrate:
  - Good listening skills & a positive attitude
  - Accountability; willingness to improve
  - Openness to feedback / Professionalism
- Talk both short- and long-term; plan/be 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 Model

B*E*S*T

B - Behavior Description
E - Express Thoughts & Feelings
S - Solicit Input/Suggest Action
T - Talk About Next Steps

“I’m sorry, I don’t understand what you’re talking about when you criticize me.”

© 2011 Ted Goff www.tedgoff.com
B E S T Feedback Example

LESS EFFECTIVE

“No one listens to me; I can never get a word in edgewise in our team meetings.”

“Well, you should speak up.”

“I don’t want to interrupt or talk over anyone”

“Everyone else does....”

MORE EFFECTIVE

B – “We are fortunate to have a passionate group of people on our team. There are times in our meetings that I do not have the opportunity to voice my ideas.”

E – “When I’m unable to contribute, the team cannot benefit from my experience and perspective. It also makes me feel undervalued.”

S – “What are some ways to ensure everyone has the chance to speak or signal that I (or others) would like to say something?”

T – “At future team meetings we will use the Zoom raise hand function on zoom to manage discussion.”
COVID Considerations

- Give yourself some GRACE!
- Communication is key – has it been sufficient both ways?
- Opportunity to clarify expectations and priorities amidst change
- Remote / distanced work may cause results to be less apparent
- What goals or strategies shifted? What “new” work was added?
- Prepare a success story or two – examples of agility/adaptability; what has worked well?
- Is flexibility needed / in place?
  - Flexible work arrangement – feedback, tweaks, evaluation
  - Focus on positive impact to CoE / students / team etc.
  - Unusual or difficult circumstances you are navigating
  - Consider socialization needs
## Next Steps: Timeline

<table>
<thead>
<tr>
<th><em>NOW</em></th>
<th>Staff initiate performance review forms (self evaluation)</th>
</tr>
</thead>
<tbody>
<tr>
<td>By 9/30</td>
<td>Staff complete their part of review; route to supervisor</td>
</tr>
<tr>
<td>By 10/22</td>
<td>Supervisor completes their part of review</td>
</tr>
<tr>
<td></td>
<td>Supervisor routes review to employee</td>
</tr>
<tr>
<td></td>
<td>Supervisor &amp; employee meet to discuss review</td>
</tr>
<tr>
<td></td>
<td>Employee electronically acknowledges review</td>
</tr>
<tr>
<td></td>
<td>Review is auto-uploaded to ePersonnel file</td>
</tr>
</tbody>
</table>
Next Steps: Homework!

- Collect Info
- REFLECT...
- Suggest Feedback Sources
- Create Review Form in Tool
- Brainstorm SMART Goals
- Route to Supervisor by 9/30
- Prepare now for NEXT year: start a Performance Journal!

“Your performance review is next Tuesday. You’re allowed to bring a guitar and up to three backup singers.”
QUESTIONS??

GREAT JOB, YOU HAVE DONE, YOUNG JEDI.

PERFORMANCE REVIEW, GOOD IT WILL BE

Thank You!