Agenda

Welcome
What is the Same
What has Changed
Process and Timeline
Important Points and Tips
Support
Performance Management…

A process, not an event

“What’s measured improves”
– Peter Drucker

“People often say that motivation does not last. Well, neither does bathing – that’s why we recommend it daily.”
– Zig Ziglar
What is the Same
Rating Scale

Templates

Process & Steps
w/ two steps removed
Rating Scale

Significantly Exceeds
Exceeds
Meets
Partially Meets
Does Not Meet
Not Applicable
Templates

1. Staff w/ Self Evaluation
   Everyone except those on the below Attachment Only template

2. Attachment Only w/ Self Evaluation
   Management levels 1 – 5
   • Chief Executive
   • Executive Management
   • Senior Management
   • Administrative Management, Director (includes Assistant & Associate Director)
   • Research Professionals – Other

Can be any format the manager chooses such as a memo. Example forms also available on the HROE site.

VPR Office provides a form for Research personnel, which is also on the HROE site.

Research template; but, it is no different than #2 – Texas A&M is not using the Research template.
What has Changed
Get Additional Manager and Reviewers Tasks Removed

More User-Friendly Layout

Review of Responsibilities
Get Additional Manager and Reviewers Tasks Removed

Additional Feedback:
- Performance Feedback Form
- Word Document (freeform)
- Email

Include in Review:
- As Attachment
- Add to manager’s comments
New Layout

Complete Self Evaluation
Self Evaluation: Staff
Performance Review (Self Eval) FY2020 Test: (Virtual) ...

01/01/2020 - 12/31/2020

Attachments
An attachment is not required. If you choose to attach a document to the Performance Review, please upload it here in the Attachments section.

Employee
Drop files here

or

Select files
New Layout
### Competencies

This section provides an opportunity to provide a rating and comments regarding competencies expected of the employee. Competencies are a system-wide component of performance reviews for all of The Texas A&M University System.

**Managers**: If you used the Get Assistant Manager feature for this evaluation, then comments for this section of the review can be viewed using the **Review Analytics** button at the bottom of the left-hand navigation bar.

<table>
<thead>
<tr>
<th>Competency</th>
<th>Description</th>
<th>Manager Evaluation</th>
<th>Employee Evaluation</th>
</tr>
</thead>
</table>
| Service    | Promotes a culture of service. Examples of behaviors might include:  
- Responds appropriately to the needs of internal and external customers.  
- Seeks to ensure positive interpersonal relationships.  
- Conveys instructions, ideas, and information clearly.  
- Follows through on commitments to others.  
- Represents own position, work unit and organization both internally and externally professionally and responsibly.  
- Anticipates needs or problems and acts to meet or resolve responsibility, efficiently and cost-effectively.  
For research focused positions, examples of behaviors include:  
- Works to create and sustain a measurable, high standard of quality in research.  
- Facilitates relationships with sponsors  
- Works to create and sustain a measurable, high standard of quality in research.  
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- Facilitates relationships with sponsors  
- Works to create and sustain a measurable, high standard of quality in research.  
- Facilitates relationships with sponsors. | Rating | Rating |
| Comment    | | | | Exceeds Expectations |

TeXAS A&M University is committed to enriching the learning and working environments for all visitors, students, faculty, and staff by promoting a culture that embraces inclusion, diversity, equity, and accountability. Diverse perspectives, talents, and identities are vital to accomplishing our mission and living our core values.
Responsibilities

Review of Responsibilities

This section provides the opportunity to provide a rating and comments on Employee responsibilities. These responsibilities are typically located within the Position Restrictions on the Employee's position in Workday.

To view the responsibilities for this position, Employees and Managers can access these responsibilities by clicking the Review Analytics button at the bottom of the blue left-hand navigation bar.

Alternatively, you can print this review and follow the directions below to access the Responsibilities of the position:

1. Navigate to the Employee's Workday profile.
2. Locate the link for the Employee position on the right side of the page and click the Related Actions icon.
3. Select Position - View Position Restrictions from the actions menu. The Responsibilities are listed on the Qualifications tab.

Do Advised: If no information is displayed after using one of these options, the Employee's position has no defined responsibilities and you may need to work with your Human Resources office to rectify this issue.

Manager: If you used the Get Assignment Manager feature for this evaluation, their comments for this section of the review can be viewed using the Review Analytics button at the bottom of the blue left-hand navigation bar.

Question: How would you rate Employee performance on the responsibilities of the position?

EMPLOYEE: To complete this section you will need to review your position's responsibilities. Follow the instructions provided above to locate the responsibilities for your position. Then, return to this section of the performance review and rate your performance on these responsibilities. In the text box provided, enter any comments regarding your responsibilities that you would like to be considered as part of your annual performance review.

MANAGER: To complete this section you will need to review the Employee's responsibilities listed in their position. Follow the instructions provided above to locate these responsibilities. Then, return to this section of the performance review and rate the Employee's performance on these responsibilities. In the text box provided, enter any comments regarding the responsibilities that you would like to be considered as part of the annual performance review.

Employee

Rating/Answer: select one

Response/Comment:

(format options available)
**Responsibilities**

<table>
<thead>
<tr>
<th>Position Restrictions</th>
<th>Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>25%: Administrative Support Provides administrative support to the Director of Talent Management to coordinate meetings, prepare documents and spreadsheets, plan and execute new initiatives, and monitor and update the status of existing procedures, processes, and policies. Researches and responds to inquiries regarding rules, regulations, policies, and procedures. Coordinates travel arrangements and prepares itineraries, meetings, seminars, and other special events.</td>
</tr>
<tr>
<td></td>
<td>25%: Recruiting Coordination Creates and maintains updated recruiting, hiring, and onboarding process information on the HR website. Coordinates with the HRIS HR Liaison Program Administrator to ensure effective communication, understanding of, and adherence to recruiting, hiring, and onboarding processes. Assists Talent team members as needed in creating an effective recruiting plan for open positions. Develops and maintains a temporary staffing agency, supporting on-campus temporary employee needs.</td>
</tr>
<tr>
<td></td>
<td>25%: Talent Development Initiatives Coordinates with Talent Acquisition and Professional Development teams to find development</td>
</tr>
</tbody>
</table>

**Manager:** To complete this section you will need to review the Employee's responsibilities listed in their position. Follow the instructions provided above to locate these responsibilities. Then, return to this section of the performance review and rate the Employee's performance on these responsibilities. In the text box provided, enter any comments regarding the responsibilities that you would like to be considered as part of the annual performance review.

**Employee**
Performance review period launched in Workday

Enter Goals in Workday

Employee enters goals to route to the manager for approval.

Or, the manager can enter goals to route for the employee’s review.

Employee Self-Evaluation

Employee receives an **Inbox task** to complete the self-evaluation.

Although optional, **employee must submit** the self-evaluation (even if leaving blank) to initiate subsequent steps.

Manager Drafts Evaluation

Manager receives an **Inbox task** to conduct the employee evaluation.

**IMPORTANT:**

Do **NOT** submit the evaluation at this time. This allows for changes to be made prior to the employee seeing the review in Workday.
Manager meets with the employee to discuss the evaluation.

Manager can make changes to the evaluation draft or send back to the employee to make changes as needed.

Any additional manager or reviewer feedback can be uploaded as attachment.

Manager submits the evaluation.

**NOTE:**
If the overall rating is “Partially Meets” or “Does Not Meet Expectations”, the evaluation will automatically route to the manager’s manager for review; otherwise, it will route to the next step.

Employee receives an Inbox task to acknowledge evaluation review.

Manager receives an Inbox task to acknowledge the evaluation review and position restrictions.

Employee & Manager Discuss Evaluation

Manager Submits Evaluation

Employee Acknowledges Evaluation

Manager Acknowledges
Timeline
Performance review period launched in Workday

April 1

Enter Goals in Workday

By March 31

Employee Self-Evaluation

By April 16

Manager Drafts Review

By April 30

Manager & Employee Discuss Review

By May 7

Manager Submits Review

By May 14

Employee Acknowledges Review

By May 21

Manager Acknowledges Review

By May 28

Dates are guides to facilitate the May 31st completion date.
The timeline can be accelerated as needed.
More time needed in the event of low performance.
Considerations

• Goals are automatically pre-populated
  • If not being used with a previous review
  • Due date is between 4/1/2020 – 03/31/2021

• All employees, regardless of employment length, should complete the performance review process.
Considerations

• Dates are guides to facilitate the May 31st completion date
• The timeline can be accelerated or delayed as needed.
• More time needed in the event of low performance
Complete or Cancel Outstanding Evaluations Prior to April 1

Self Evaluation

• Is still optional; but, highly recommended
• Employee submits to initiate Manager Evaluation

Additional Manager and Additional Reviewer

• No longer need to take action
• Upload attachments (e.g., emails, letters)

Managers – Do NOT click Submit until after conversation with employee
TAMU Specific Training
vILT (Zoom)

TAMU Specific Job Guides

Visit...