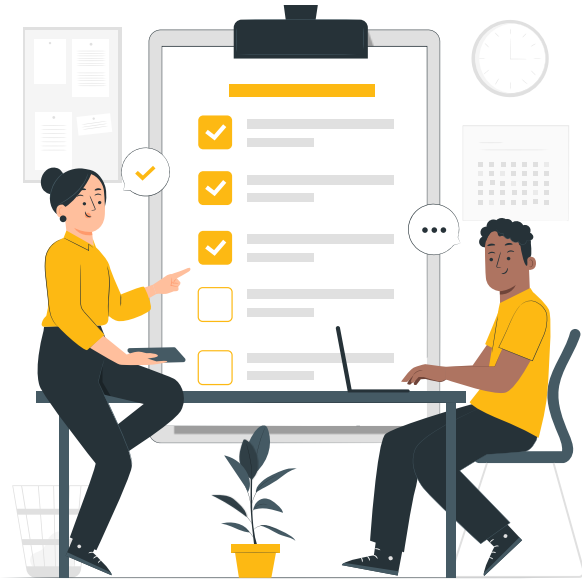# Performance Management Program

Presented By

**The Office of Human Resources**

February 2024

Agenda

- Kick-off Question
- Philosophy
- Eligibility
- Timeline
- Updates
- Structure
- Prompts

- SMART Goals
- Performance Factors
- Ratings
- Best Practices
- Workday
- Demo
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Kick-off Question

Picture a highlight reel of this past year.

Within your role at HMC, what was a significant moment that deserves a replay, and how did it make you feel like a superstar?
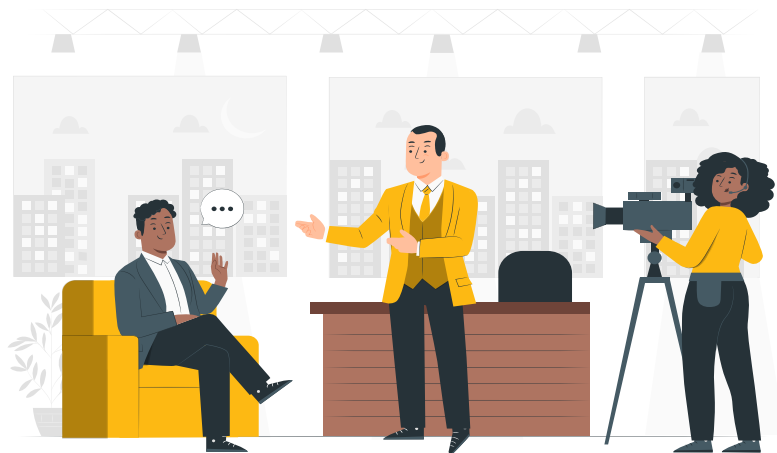
Performance Management Philosophy

Harvey Mudd College (HMC) recognizes all Workers as essential to the overall success of the College. This success is achieved by fostering a work environment in which Workers are inspired to perform to the best of their abilities.

HMC's performance management cycle and processes allow Workers and Managers to:

- Highlight accomplishments and contributions

- Discuss areas of improvement

- Re-examine roles and responsibilities

- Set goals and expectations for the upcoming year

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Performance Management Eligibility

Workers Include
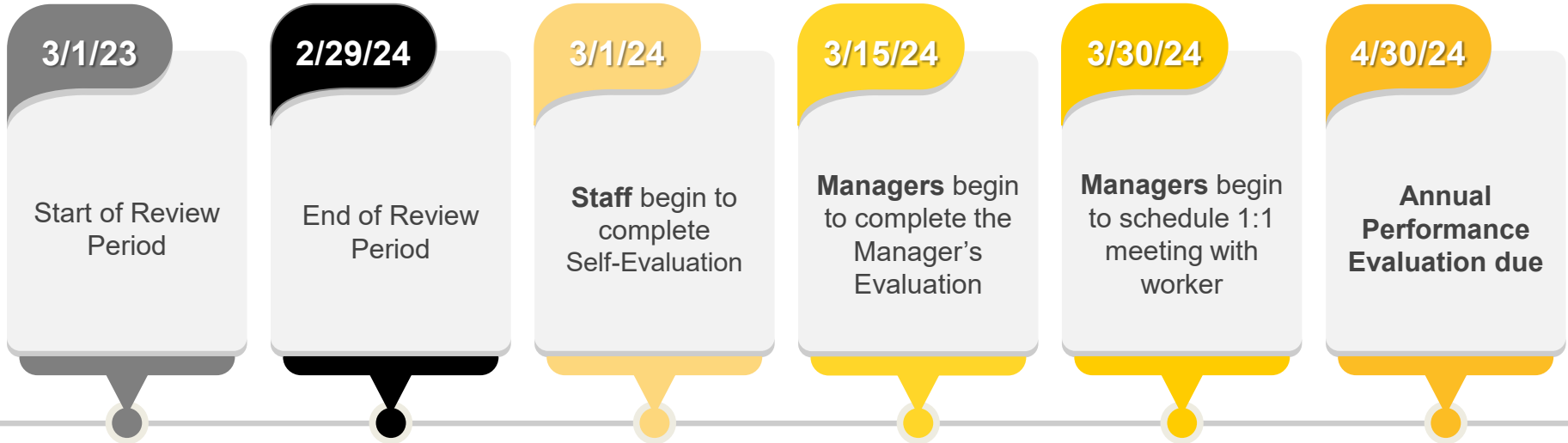
- Regular Staff
  - ❑ Full-Time and Part-Time

Workers Exclude

- Temporary

- Student Workers

- New hires starting on or after Sep 1, 2023

- Workers in new positions or promotions as of Sep 1, 2023

- Faculty

Performance Management Timeline

3/1/23
Start of Review Period

2/29/24
End of Review Period

3/1/24
Staff begin to complete Self-Evaluation

3/15/24
Managers begin to complete the Manager's Evaluation

3/30/24
Managers begin to schedule 1:1 meeting with worker

4/30/24
Annual Performance Evaluation due

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Evaluation Updates

❑ **Change in evaluation period**

▪ 12-month period: March 1, 2023 – February 29, 2024

▪ Previously it was 12-14 month period

❑ **Added Supplemental Evaluation section**

▪ Area to add in details from March 1, 2024, through April 30, 2024

▪ Optional section

❑ **Workday Layout**

▪ Guided Experience

▪ Sidebar to guide users through the different sections

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Evaluation Structure

Self-Evaluation Questions	Employee's opportunity to highlight accomplishments and performance during the review period
Overall Evaluation	4 - Highly Effective 3 - Successful and Effective 2 - Some Improvement Required 1 - Significant Improvement Required
Supplemental Evaluation Comments	Identify and document any significant event that occurred subsequent at the end of the evaluation period
Supporting Documents	Upload documents that relate to the annual performance review
Acknowledgements	Worker and Manager must both acknowledge the review

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Self-Evaluation Prompts

1) Summarize performance of job responsibilities and accomplishments. This is an opportunity to review your job description with your manager.

2) Summarize performance of goals during the past 12 months.

3) If you performed any new responsibilities or additional duties that are outside the scope of what you do regularly, what were they?

4) What were your greatest contributions to the department and/or College?

5) In what areas, if any, would you like to gain more experience, training, or education?

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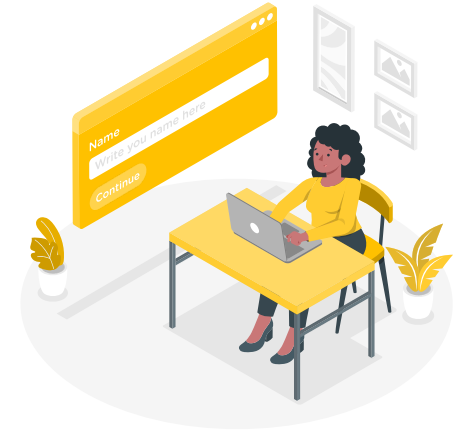
SMART Goals

SPECIFIC	Clearly define your goal. Be precise about what you want to achieve, avoiding vague or broad statements. Ask yourself the who, what, where, why, and how to make your goal specific and well-defined.
MEASURABLE	Establish concrete criteria for measuring progress toward the achievement of your goal. This helps you track your success and know when you've reached your objective.
ACHIEVABLE	Ensure that your goal is realistic and attainable. Consider your resources, skills, and the time available when setting the goal.
RELEVANT	Align your goal with your overall objectives and values. Ensure that the goal matters to you and is consistent with your broader aspirations. This helps maintain motivation and keeps you focused on meaningful objectives.
TIME BOUND	Set a specific timeframe or deadline for achieving your goal. This adds a sense of urgency and helps prevent procrastination. It also allows you to monitor progress and adjust as needed.

SMART Goals: Example

Avoid:

I will take an Excel class to improve my skills.

Instead:

I plan to enhance my Excel skills by taking an online course by the end of August 31st, 2024. I will achieve my goal by completing the course with a passing grade. This will help me develop a higher-level skill set within my current role.

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Performance Factors

- Quality of Work
- Productivity
- Use of Resources
- Technology Skills
- Customer Focus
- Safety Compliance
- Collaboration and Teamwork
- Communication
- Interpersonal Relations
- Initiative

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Performance Management Ratings

4 — *Highly Effective*
The individual consistently exceeds expectations and demonstrates outstanding performance in all relevant areas of their responsibilities. They go above and beyond in achieving goals and contribute significantly to the success of the team or organization.

3 — *Successful and Effective*
The individual consistently meets expectations and performs well in all relevant areas of their responsibilities. They successfully fulfill their role, contribute to team objectives, and demonstrate competence in their tasks.

2 — *Some Improvement Required*
The individual meets some expectations but may have areas where improvement is needed. There are areas where their performance could be enhanced or refined. The employee may require additional support, training, or development in specific aspects of their role.

1 — *Significant Improvement Required*
The individual's performance falls below expectations in multiple areas, and there is a clear need for significant improvement. There may be issues affecting their effectiveness, and immediate attention, feedback, and corrective measures are necessary to bring their performance up to the required standard.

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Best Practices

- Start Self-Evaluation early. Allow yourself enough time to think through responses and be as comprehensive as possible.

- Add supporting documentation in Workday that is relevant to the review.

- Annual reviews should be comprehensive and clear. Comments should articulate reasonable expectations.

Workday

Workday Steps: Worker
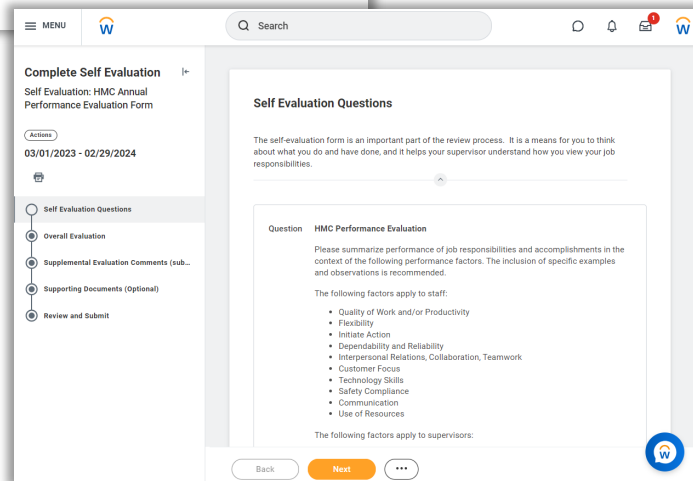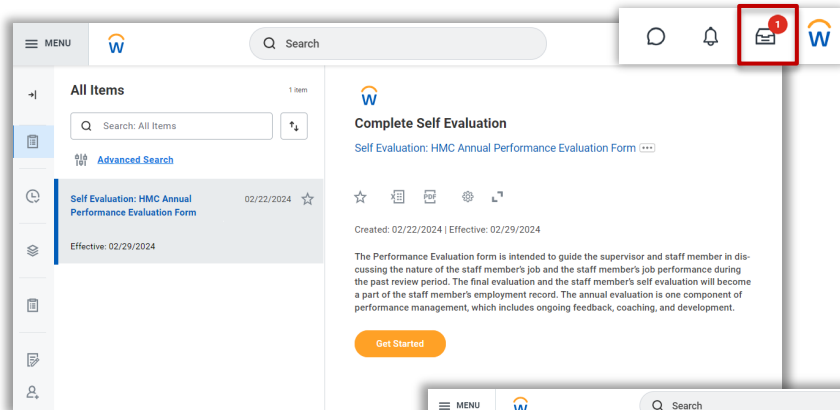
- ❑ Worker will receive a Workday Inbox task to complete a **Self-Evaluation**.

- ❑ The Self-Evaluation is complete once the worker clicks the "**Submit**" button at the end of the form.

- ❑ Manager will receive a task to complete the **Manager Evaluation** of the Annual Performance Review.

- ❑ To save progress you can select the "Save for Later" button.

- ❑ Workday will also automatically save comments in the text boxes.

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Workday Steps: Manager
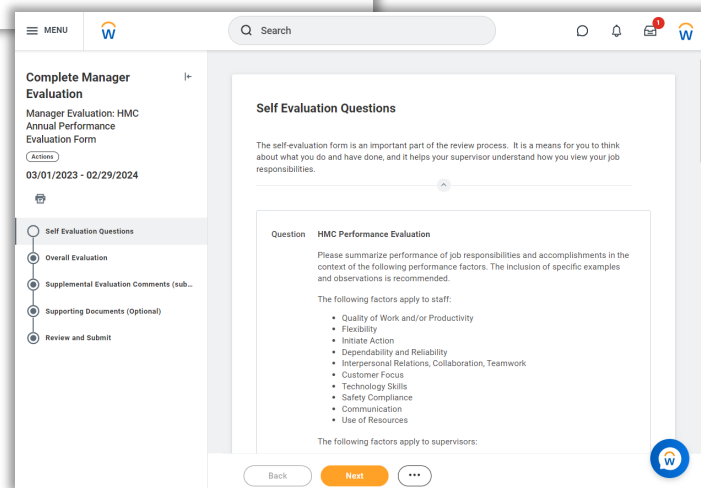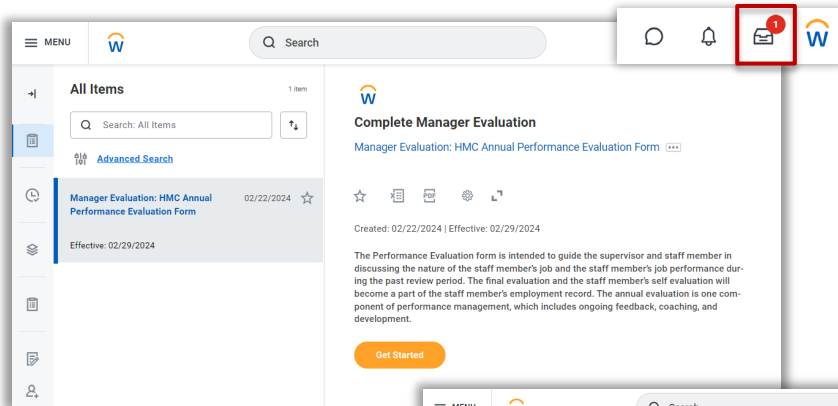
- ❑ Manager will receive a Workday Inbox task to complete the **Manager Evaluation** after Worker has completed their Self-Evaluation.

- ❑ The Manager Review will be finalized once the manager clicks the "**Submit**" button at the end of the form.

- ❑ After Manager has met with Worker, Manager must confirm the meeting by clicking the "**Submit**" button from the Workday inbox.

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Post-Review Comments & Acknowledgment

The Performance Evaluation form is intended to guide the supervisor and staff member in discussing the nature of the staff member's job and the staff member's job performance during the past review period. The final evaluation and the staff member's self evaluation will become a part of the staff member's employment record. The annual evaluation is one component of performance management, which includes ongoing feedback, coaching, and development.

Acknowledgement

Manager Acknowledgement	Employee Acknowledgement
Status *	**Status**
Acknowledge Review	Acknowledge Review
Comment	**Comment**
Entered by	**Entered by**
Pamela Gomez (104156)	Haley Deal (900032)
Date	**Date**
02/23/2023 12:40 PM	02/23/2023 12:30 PM

❑ Workers and Managers can **add comments** in Workday to the evaluation after the 1:1 meeting

❑ In Workday, **Worker** will acknowledge the evaluation **first** and **then** the **Manager**

❑ After **both acknowledgments** have been recorded, the annual review is complete.

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Demo

FAQs

- **Do I have to provide comments in all areas?**

  Workday will display a red error message with information on any missing information.

- **I did not get a Workday notification to complete a self-assessment (annual). Will I receive one?**

  For any new hires or existing employees who have had job changes as of 9/1/23, your introductory review will be used in lieu of an annual review. Check with the HR office if you feel you have a different circumstance.

- **How does my overall rating affect my compensation?**

  Any Worker receiving a 1 or 2 from their manager typically receives a lower increase than employees with a rating of 3. Workers with an overall rating of 4 typically receive a higher increase than those with lower ratings.

- **How can I obtain a copy of my last annual review?**

  In Workday, you can navigate to the Career section in your profile and access your previous annual and introductory reviews.

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Questions

Please, reach out to the HR Office (hr@hmc.edu) for any follow-up questions.