Today’s Objectives

- What you need to know about the process:
  - Brief Overview of Cycle and Timeline
  - Forms Reviews
  - Our Focus This Year
  - Tracking and Managing Changes
  - Demo of Status Rating and Inquiry Page in PeopleSoft
  - Website and Training Resources
  - Questions
Performance Management Cycle

**Summer/Fall**
- HR creates document and sends kick-off message to community
- Planning Phase/Goal setting for the year ahead (SMART Goals); enter performance and development goals; manager is alerted
- Manager reviews and edits goals
- Employee and manager discuss and finalize

**Spring**
- Employee completes Self-Evaluation
- Employee identifies other Reviewers for feedback
- Manager agrees/amends and seeks feedback from others
- Final Self and Written Assessment
- Manager completes assessment
- Employee and manager discuss and finalize
- Individual/Multi-Rater/Upward Feedback

**Ongoing**
- Manager/Employee Feedback (Behavior + Impact)
  - Track progress
Timeline

September 30, 2014 – Goal Setting and Planning completed

- Standard Form users – Staff and managers will enter this information directly into PeopleSoft (Self-Service or Manager Self-Service>Performance Management>My Current or Team Current Documents).

- Summary and Exception Form users – Staff and managers will capture FY15 goals in an electronic format that can be updated and referred to for the Assessment Phase in the spring of 2015.

December 2014 – February 2015 – Informal Interim Check-in Discussions completed

- This is a useful way to discuss and implement any adjustments to goal content and/or goal dates.

May 29, 2015 – Performance Assessments completed

- PeopleSoft will be down Friday, May 29th at 5pm until Monday, June 1st, 8am.
A Word about the Conversation and Ratings

- We will continue to work with you toward sustaining a high level of participation in Performance Management.
- We will also continue to use the ePerformance tool in PeopleSoft.
- However, this year want to focus less on the tool and more on the conversation and ratings.

Let’s talk about what that means....
Review of ePerformance Components

One Overall Performance Rating
- 5- Leading Performance
- 4- Strong Performance
- 3- Solid Performance
- 2- Building Performance
- 1- Not meeting expectations

Ratings for Each Competency
- 4- Advanced
- 3- Proficient
- 2- Developing
- 1- Does Not Demonstrate

Ratings for Each Goal
- Met
- Partially Met
- Not Met
- N/A

Ratings for Orientation & Review Period
- Meeting Expectations
- Partially Meeting Expectations
- Not Meeting Expectations

Competency Development
- University-Wide for Staff and Managers
  - Teamwork and Collaboration
  - Embraces Change
- University-Wide for Managers
  - Resource Allocation
  - Building a High Performing Team
- School-specific
  - SPH
    - Communication
    - Deliver Results
    - Knowledge of Job
  - HMS
    - TBD based on year-one data*
  - HSDM
    - Attendance & Reliability
    - Interpersonal Skills
    - Pursues Excellence
  - *Employees and managers may choose additional competencies from ePerformance Competency Dictionary

Feedback from Others Reviewers
- For Staff from peers, colleagues, clients, etc.
- For Managers from direct reports
Forms Review

**Standard Form**
- Goals
- Competencies
- 360/Upward Feedback
- Self-Evaluation
- Manager’s Review

**Summary Form**
- Goal Summary
- Competencies
- Feedback Summary
- Overall Summary and Rating

**Exception Form**
- Overall Summary and Rating
- w/Attachment option
Tracking and Managing Changes

• Each Department Administrator has the Department Admin Light role which allows you to track documents for staff from the Status and Ratings Inquiry Page in ePerformance. (Eureka Job Aid)

• All managers have the Managers Dashboard and Talent Summary, these were new features in ePerformance. (Eureka Job Aid)

• For immediate supervisor changes, HR can assist you with that during the process. Let your HR Partner know.
  – For Harvard Chan School contact Travon Simmons or Trina Weekes
  – For HMS/HSDM contact Jennifer Ryan

• Demo: Status and Rating Inquiry Page for Tracking Reviews
Website and Training Resources

- Staff and managers can register for the HLC Year-end Assessments: Helpful Tips in PeopleSoft:

<table>
<thead>
<tr>
<th>Date/Location</th>
<th>Staff Sessions</th>
<th>Manager Sessions</th>
</tr>
</thead>
<tbody>
<tr>
<td>4/2/15 Countway-Ware</td>
<td>1:30p-2:30p</td>
<td>3p-4p</td>
</tr>
<tr>
<td>4/15/15 GH-Waterhouse</td>
<td>10a-11a</td>
<td>11:30a-12:30p</td>
</tr>
<tr>
<td>4/30/15 GH-Bibring</td>
<td>1:30p-2:30p</td>
<td>3p-4p</td>
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<tr>
<td>5/13/15 Countway-Ware</td>
<td>10a-11a</td>
<td>11:30a-12:30p</td>
</tr>
</tbody>
</table>

- The HLC Performance Management Page

- Check out Eureka which has:
  - Job Aids for each step of the process
  - On-Line Courses (self pace)
  - ePerformance Quick Tours

- For questions call or email:
  - Linda Miklas
  - Jennifer Ryan
  - Trina Weekes
  - Travon Simmons
  - Your HR Partner/Consultant
Questions