

Performance Evaluations

ePerformance Overview for Managers



KENNESAW STATE
UNIVERSITY
HUMAN RESOURCES



A NOTE FROM OUR CHRO

Karen McDonnell



Dear Faculty & Staff,

Each year in December and January, all staff go through the process of self-evaluation and being evaluated by their manager on how well they met expectations around outcomes and core competencies for the previous year.

These assessments focus on the bigger picture of your performance—the **“what”** (how successful you were at meeting your goals and what results you delivered) and **the “how”** (the skills, mindsets, and values you used to get there). They are an opportunity for **self-reflection, feedback, and getting aligned** with your employees on next steps and expectations for the coming year.

This is part of our ongoing effort to grow our impact, support staff development, and promote fairness and transparency. If you have any questions about the process please reach out to your HR Business Partner for assistance.

ABOUT THE COURSE

EVALUATION PROCESS OVERVIEW

Are you dreading the annual performance review process? Did you have trouble last year pushing the ePerformance form to the next step in the process, or having to constantly refresh the system? Maybe you were faced with a challenging conversation where you had to realign an employee's expectations and connect to the department purpose. Maybe you don't feel like you have **time to dedicate or aren't prepared enough** to provide valuable feedback.

Not to worry, the hard work you've done throughout the year makes you and your employees better prepared for this next step. This year was different from all the others, you wrote and tracked goals for yourselves, your team, and your employees, you also completed, hopefully frequent and well documented check-ins.

We're here to help! In this overview we will discuss the why behind evaluations, how to prepare and conduct a successful conversation, the framework and tactical milestones involved with the form and how to navigate the ePerformance system.

INSTRUCTORS

HUMAN RESOURCE BUSINESS PARTNERS



**MELANIE
UKEN**



**TIFFANY
LAYDEN**



**ANGELA
WHITE**



**LISA
HASKETT**



**CHRISTINE
ARABATZIS**



**RACHELLE
STIVER**

OBJECTIVES

PERFORMANCE MANAGEMENT

PURPOSE

Identify how effective performance management conversations can lead to greater business impact.

PREPARE

Managers will learn how to prepare themselves and their employees for two-way communications.

FRAMEWORK

Understand the process, roles & responsibilities, and tactical steps necessary to completing the performance evaluation forms.

ePERFORMANCE

Observe the online ePerformance system walk-through and execute the necessary steps with ease on your own.



PROGRAM GUIDE

STEP BY STEP LESSONS TO GUIDE YOU THROUGH THE EVALUATION PROCESS

PURPOSE

Find Your Why



MILESTONES

Process Outline



CONTRIBUTORS

Key roles & responsibilities



PREPARE

Create an agenda



MEETING

Dedicate time



CALENDAR

Due Dates



MERIT

Process



USER GUIDES


Walk through ePerformance



ASSESSMENT

Check yourself





1

LEARNING SESSION

PURPOSE

CONTINUE >

PURPOSE

FIND YOUR WHY

Performance management is an **ongoing** process of **communication** between a manager and an employee that occurs throughout the year, **in support of** accomplishing the **strategic objectives** of the university.

Performance appraisals are a **formal record** of a supervisor's assessment of the **quality** of an employee's **work performance**.

When done well, a performance appraisal.....

- reinforces the value of the employee's work
- is balanced, objective, and informative
- provides specifics about what went well, and what areas to tackle for improvement
- contributes to the future success of the organization
- engages employees in developing a career plan
- creates an environment for collaboration and open communication
- provides a record/foundation for merit increase and disciplinary action (if warranted)

PURPOSE

PERFORMANCE MANAGEMENT - BUSINESS IMPACT



Drive Success

Ensures that employee's work is focused on the right areas to drive success



High Potentials

Reinforces a performance-based model where exceptional performance is rewarded and high performers are identified



Engagement

Fosters employee engagement and increases retention



Productivity

Maximizes work efficiency



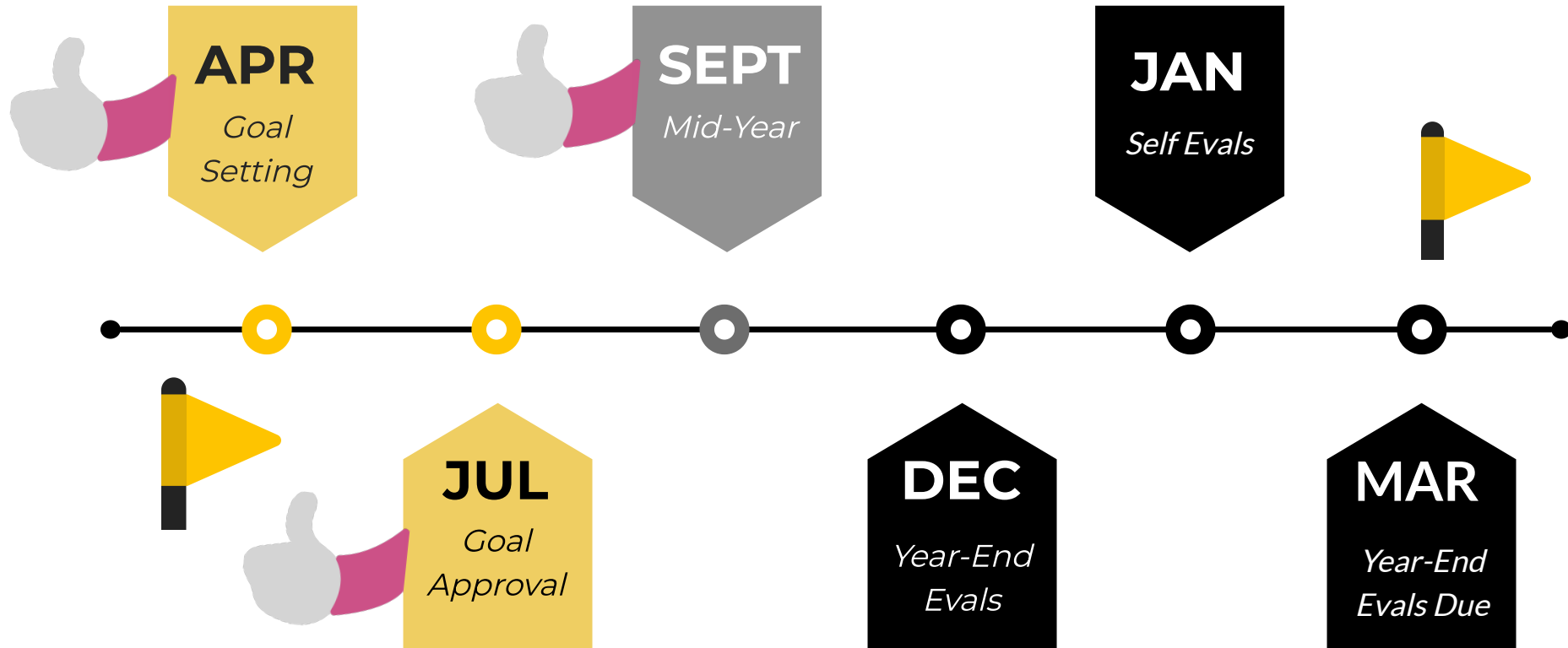
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LEARNING SESSION

PERFORMANCE MILESTONES

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PERFORMANCE MILESTONES





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LEARNING SESSION

CONTRIBUTORS

CONTINUE >

Who gets an evaluation?

STAFF PERFORMANCE PROCESS



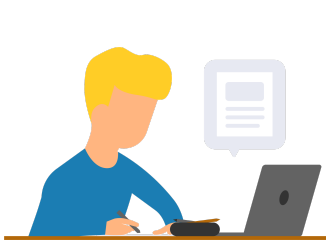
Will be evaluated:

- Full-Time Employees
- Part-Time Employees
(20 hours or more)
- Staff Only
- Hired on or before August 1, 2023

Will not be evaluated in this process:

- Part-Time Employees
(19 hours or less)
- Temporary & Student Employees
- Faculty evaluations follow the Faculty Affairs process
- Employees hired after August 1, 2023

ROLES & RESPONSIBILITIES



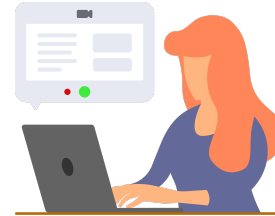
EMPLOYEE

- Complete self-evaluation
- Seek continuous feedback
- Participate in conversation regarding past performance and accomplishments



MANAGER

- Build Trust
- Listen Actively
- Create opportunities for feedback
- Complete ePerformance Form
- Set department goals



NOMINEE

- Respond timely
- Give fair and equitable feedback
- Ensure there are no surprises
- Document throughout the year



SECOND LEVEL

- Review employee and manager ratings
- Ensure equity and fairness
- Set division goals that align with university strategic plan



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LEARNING SESSION

PREPARE

CONTINUE >

PREPARE

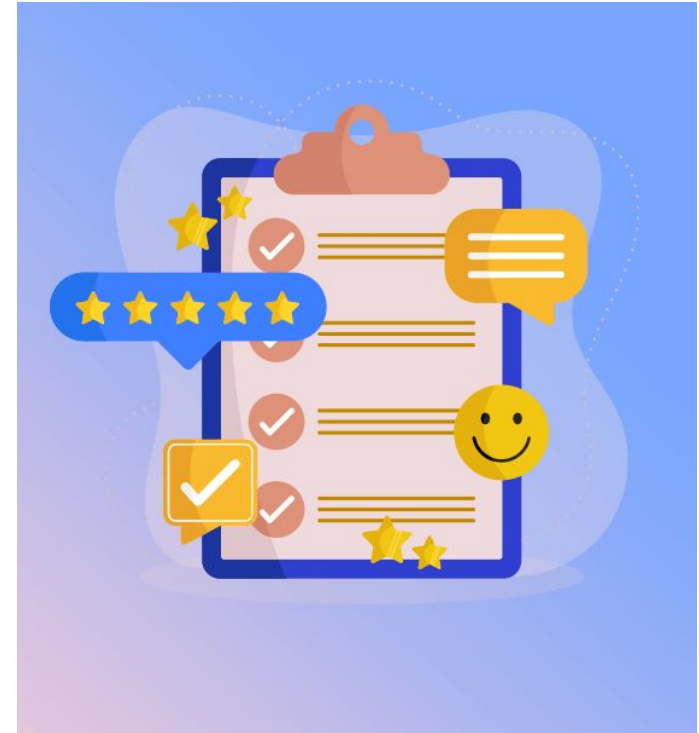
TIME WELL SPENT

Take the time to prepare now, your employees deeply care about what happens in their review.

Making it fair, productive, and engaging will be hugely important.

A performance evaluation is a formal, permanent document that will have a big impact on your employee's future.

So, to show respect and to help with their development you are going to have to become excellent at creating and delivering a review.



HOW TO PREPARE FOR AN EVALUATION MEETING



CLICK ON THE BUTTONS BELOW TO EXPLORE MORE

Review the Ratings Scale



Review Previous Evaluations



Evaluate goal progress



Create & Send an Agenda



Review Form Sections



Review 1:1 Notes from the year



Review Employee's Self Evaluation



Complete the ePerformance Evaluation Form



Review Performance Factors



Compile your notes



Review Nominee Feedback



Send for second level approval



Review Evaluation Weights



Email employee prep questions



Confirm Training Compliance





Compile notes about what has happened this year.

- What are they doing that is working?
- What are they doing that is not working?
- What skills or behavior do they need to develop?



e-Performance Sections

Performance Factors

Reliability/Attendance
Adherence to Policies
Interpersonal
Relationships
Customer Service
Innovation

Job Knowledge
Quality of Work
Communication
Critical Thinking
Initiative

Leadership Factors

People Management Strategic Planning
Organizational Development

USG Core Values

Integrity
Excellence
Accountability
Respect

Institutional Values

Student Inspired
Open & True to Myself
Impact Generating
Promise Fulfilling
Elevational



Evaluate Goals

Ensure your employees have goals entered in the evaluation form. Otherwise, there will be an error in the overall score calculation.

Remember, you will be measuring and rating these goals on a 1-5 scale. Make sure there are defined levels of achievement, goals should not be subjective.



Complete the Form

Now you are ready to begin rating and entering supporting comments in the evaluation form.

Remember: any rating other than a three (3 - Successful), requires documented notes.

You will need to rate and provide comments for Goals, Performance Factors, and Values.

Use the ePerformance writing tool, BARS and performance phrases for additional writing support.



Ratings

5 - Exemplary

- Outstanding performance that consistently exceeds milestones

4 - Superior

- Good, solid performance that fully meets milestones and on occasion exceeds milestones

3 - Successful

- Good solid performance that meets all milestones. This rating conveys solid, effective performance

2 - Partially Successful/Emerging

- Performance falls short of the minimum criteria and standards of milestones

1 - Not Successful

- Performance in this area is inconsistent and does not meet milestone. Immediate and substantial improvement is needed to address this area




Review Employee's Self Evaluation Notes

Get on the same page. Review the self evaluation to see where your employee has rated themselves and their performance over the last year.

If there is not enough information, do not hesitate to reach out to them and ask for more information.

The same rule applies, anything other than a 3 needs supporting comments.

Provide additional support by showing your employee the Self Evaluation Toolkit - found here: 



Evaluation Weighting Scale

INDIVIDUAL
CONTRIBUTOR

LEADER



GOALS

10%

20%



PERFORMANCE
FACTORS

90%

80%



LEADERSHIP FACTORS



USG CORE VALUES

Rated but not weighted



INSTITUTIONAL VALUES



Second Level Approval

Once you've completed the ePerformance form you will submit for approval to your manager.

Your manager may request modifications or add notes to the form. You can find more information on how to view these notes in the ePerformance User Guide section of this training.

Remember to submit for approval 1-2 weeks before your evaluation meetings, to give your manager time to review.



MEETING AGENDA

PERFORMANCE EVALUATION

- | | |
|--|--|
| 1 Casual chit-chat (2 minutes) | 5 Areas for improvement (10 minutes) |
| 2 Review the agenda (3 minutes) | 6 Career plans (10 minutes) |
| 3 Discuss employee growth since last review (5 minutes) | 7 Targets, goals, actionable items for next review (10 minutes) |
| 4 Current performance (15 minutes) | * Total: 55 minutes |



Performance Factors

KSU has developed a behaviorally anchored rating scale for each of the Performance Factors to help you identify between the varying levels of exemplary to not successful performance.

Click Here



Performance Phrases

In addition to the writing tool available in ePerformance, we have found a great resource to help you gather further inspiration for drafting your performance phrases.

Click Here





Compliance Training

Ensure your employee has completed all of their required trainings for the year.

You can check employee training status in Owl Express.

<https://owlexpress.kennesaw.edu>



Review Documentation

Familiarize yourself with notes you have taken throughout the year.

- 1:1 Meeting Notes
- Action Items
- Objectives
- Expectations
- Counselings/PIP
- Awards/Recognition



Nominee Feedback

You have the ability in ePerformance to request additional feedback from a nominee.

This can be a previous manager, client or partner that has further insight into your employee's performance.

Ensure that you and your nominee do not have conflicting feedback, the employee will be able to see their comments in the evaluation.

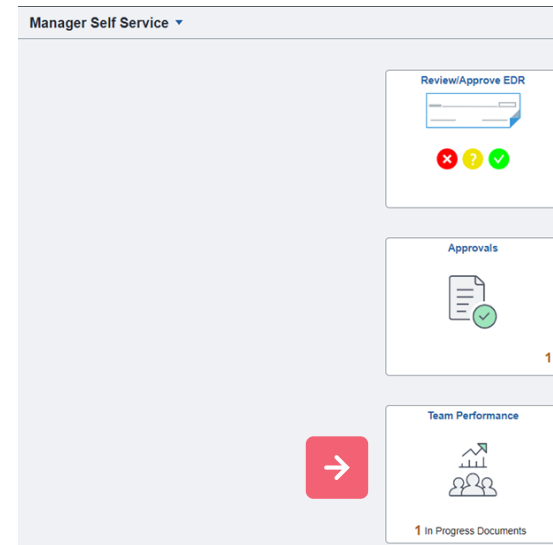
You can find out more on how to view comments in the ePerformance User Guide section of this training.



Review Past Evaluation Notes

Reviewing past evaluations notes can help you understand how far the employee has come from the previous year and what things they did or did not do to improve.

Evaluations from previous years can be viewed in OneUSG - Manager Self Service by clicking on the Team Tile.





Prepare Your Employee with Talking Points

One to two days before your evaluation meeting it is a good idea to send a email asking them to prepare 2-3 things they are proud of accomplishing this year.

Following this tip can make your employee feel more confident and calm on meeting day. Also, this helps in case you may have missed something along the way.



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LEARNING SESSION

CONDUCT MEETING

CONTINUE >

MEETING

GROW COACHING MODEL

As a manager you aren't expected to have the answer to everything. Effective coaches ask powerful questions. Use the GROW coaching model to help set the framework for your performance evaluation meeting.

- **Goal**
 - What were our objectives?
 - What were the things we expected to accomplish?
- **Reality**
 - Establish the current reality.
 - Discuss observed & specific situations or behaviors.
 - What's the most important thing I can do differently for you as your manager?
- **Options**
 - Explore solutions, share ideas and generate options.
 - What strengths to explore and resources are available?
- **What's Next?**
 - Discuss outcomes and action items for next year's goals.
 - Be open & honest with your growth and development conversations.
 - Where do you want to go and what is your plan?
 - Agree and follow up.

Interested in learning more about the GROW coaching model? Connect with your HRBP for more information and a coaching toolkit.



PERFORMANCE SCENARIOS

TRY THESE CONVERSATION PROMPTS TO GET STARTED



When you want to build trust.....



When you want to encourage confidence.....



When you need to share critical feedback.....



When you're looking to create a shared understanding.....



Building Trust

The best leaders know they can make a mistake – and they openly admit that to their team as a means of getting better, and building trust.

Use these phrases when you need to do the same.

- ☐ “Here’s where I think I fell short”
- ☐ “It was my fault when...”
- ☐ “Here’s what I intend to do differently...”
- ☐ “You were right when...”
- ☐ “Thank you. I’m going to process and internalize that feedback as much as I can...”



Encourage Confidence

You want to positively reinforce your team member's behavior. Use these phrases (more specific and personal, than just a generic "Good job" or "Well done.")

- ☐ "Here's why you're unique and valuable for the team..."
- ☐ "I was most impressed when..."
- ☐ "We hired you because..."
- ☐ "The best work I think you produced this year was when...."
- ☐ "I learned X from you when..."



Create Understanding

You're interested to see where your direct report stands.

What do they think about the team? Are they engaged? Are they frustrated by anything?

Use these questions to help reveal more understanding:

- ☐ "When have you felt most motivated this past year?"
- ☐ "When have you felt most disappointed in the team this past year?"
- ☐ "What was the most energizing project for you to have worked on? Why?"
- ☐ "What was the most frustrating project for you to have worked on? Why?"
- ☐ "Is there anything I tend to do that you find – particularly helpful?"
- ☐ "Is there anything I tend to do that you find particularly burdensome?"
- ☐ "What do you think is the greatest way, we as a team, can improve in the upcoming year?"



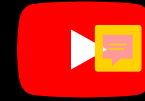
Critical Feedback

These are for the times when you need to give honest feedback without coming across as demoralizing:

- ☐ “I believe in your ability to improve in these things...”
- ☐ “It’s my job to support you in becoming better in these areas...”
- ☐ “Can we riff together on ways we can better support each other?”
- ☐ “May I offer some ideas for areas of growth?”
- ☐ “Can I suggest a few challenges for you, as you look to accelerate your own growth and learning?”
- ☐ “May I point out a few opportunities that might be useful, as you think about your career progression?”

MEETING DO's & DON'Ts

CHECK OUT THESE VIDEO ROLE PLAY EXAMPLES





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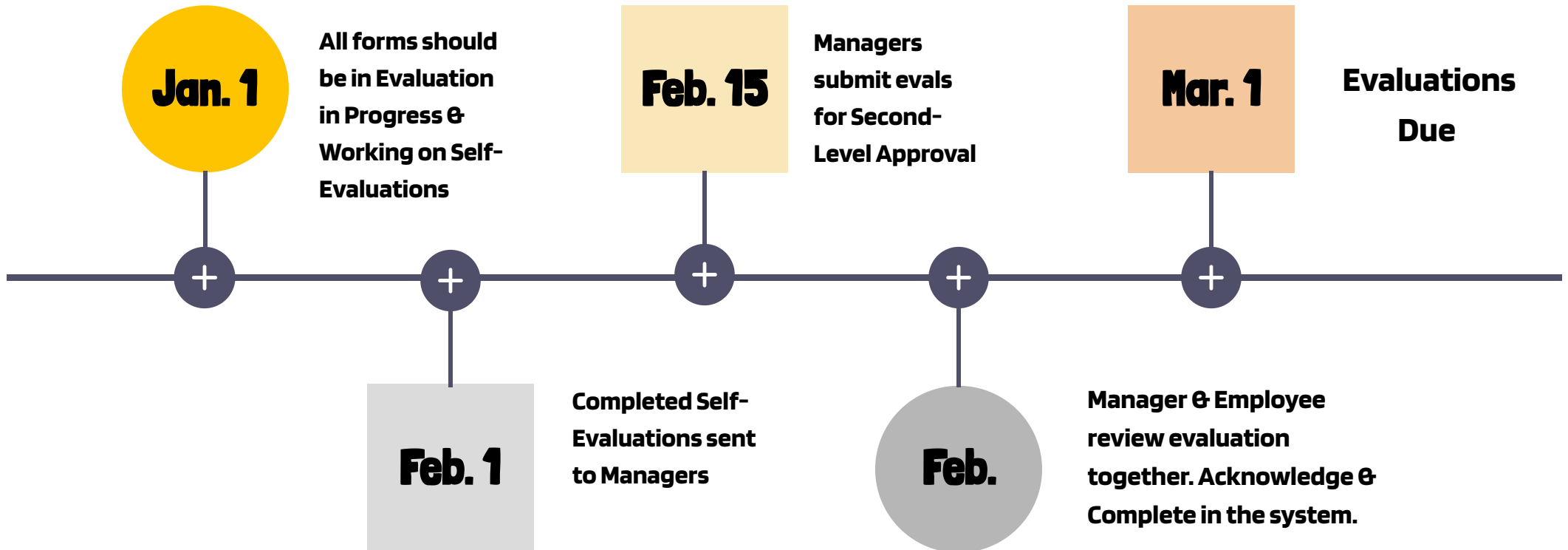
LEARNING SESSION

CALENDAR

CONTINUE >



TIMELINE & DUE DATES





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LEARNING SESSION

MERIT

CONTINUE >

Merit Process

The state legislature and subsequently USG have not yet confirmed if employee merit will be a part of the budget process for the coming year.

For a manager to be eligible for any possible merit increase, they must have completed all evaluations for the staff directly reporting to them by the March 1, 2024, deadline.



Click here to review the ePerformance work flow steps that must be completed by March 1, 2024.



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LEARNING SESSION

ePERFORMANCE GUIDES

CONTINUE >

Where are we now?

DATE	CYCLE STAGE	ONEUSG TERMINOLOGY
1/1/2023 - 6/30/2023	Goal Setting Process - Discussions between manager and employee to set goals for 2023.	Define Criteria - Goals can be entered by employee; manager can enter, edit and delete.
7/1/2023 - 9/14/2023	Ongoing Goal and Performance Review - Regular discussions between manager and employee.	Checkpoint 1 - Managers can have a formal feedback with their employees (can be skipped). Managers are able to edit, delete and add goals as needed.
9/15/2023 - 12/31/2023	Finalizing Goals - Confirm which goals will be rated on the final evaluation.	Finalize Criteria - Managers are able to edit and delete before opening the final evaluation to the employee.
1/1/2024 - 2/1/2024	Evaluation in Progress - Employee completes self-evaluation. Manager can nominate others for feedback and begin drafting ratings and comments.	Evaluation in Progress - Employee completes self-evaluation. Manager can nominate others for feedback and begin drafting ratings and comments.

User Guide

Click the play button to view step-by-step instructions for the topics below.

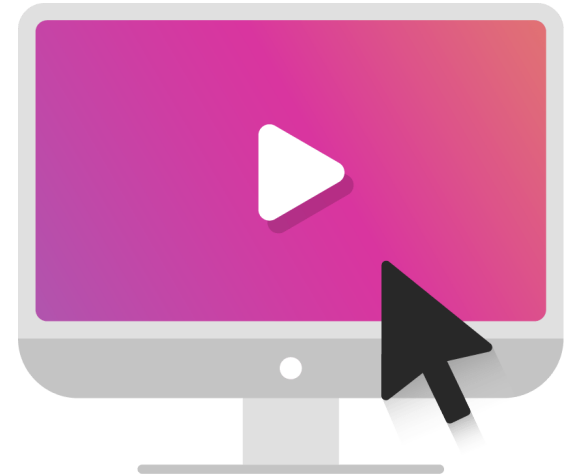
- Finalize Criteria
- Open Self-Evaluations
- Complete Manager Evaluation
- Submit for Second-Level Approval



User Guides

Click the play button to view step-by-step instructions for the topics below.

- How to re-open an employee's evaluation
- How to nominate participants in ePerformance
- Accepting and Completing Nominations
- Viewing and Sharing Next Level Supervisor Comments





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ASSESSMENT

CHECK WHAT YOU KNOW

CONTINUE >



Question 1

1

Who gets a 2023 evaluation?

**a.) Full-time staff (20+ hours),
hired on or before August 1,
2023**

**b.) All staff regardless of hire
date**

**c.) Faculty, Staff and students
who work more than 20 hours a
week.**



Question 2

2

When are evaluations due?

a.) March 1, 2024

b.) January 1, 2024

c.) March 31, 2024



Question 3

3

What is the final step in the ePerformance form?

a.) Evaluation Complete

b.) Signatures

c.) Acknowledgements



CONTACT

Human Resources

If you have any questions, concerns or feedback related to this overview or performance evaluation process, feel free to reach out to your HRBP directly.

Whether it's about preparing for an evaluation, understanding the process, or seeking advice , we're here to help.

