Office of Human Resources
Workshop for Staff
Topic: Performance Management
Presented by Cynthia Farquhar
Introductions

Using the chat please share

Your name, title and department
Ice Breaker

Using the chat please enter:

What is the best piece of feedback you have ever received?
Brandeis University’s NEW Performance Management Program - TAP

Core Components & Program Outcomes

Timeline & Performance Cycle

Tips for Effective Check-Ins & Preparing for the Mid-Year Review

Next Steps

Q & A

Resources
Brandeis University’s NEW Performance Management Program

TAP = Talent Advancement Program
Today’s Training

• Will focus on what you, as a staff member, should do as part of TAP.

• Specific topics we will cover today:
  • TAP: what it is; timing, staff role
  • Performance Engagement
  • Check-Ins
  • Mid-Year Review

• Training on using Workday for the mid-year review is coming: *October/November*.

• Training on the annual review will take place *Spring 2023*.
What is TAP?

• TAP (Talent Advancement Program) is the acronym for Brandeis University’s NEW performance management program for staff.

• TAP will replace Brandeis’ current staff performance review process and, when implemented, will support our shared commitment to developing and promoting a culture of engagement.

• **Who is eligible:** non-union staff* who have been employed at least 90 days prior to Nov. 14 (mid-year review launch).

* Will include Library union staff.
## Why TAP?

<table>
<thead>
<tr>
<th>Current State</th>
<th>Future State</th>
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<tbody>
<tr>
<td>Annual performance reviews with inconsistent focus and adoption across departments/areas.</td>
<td>Manager and staff shared accountability for measurable results with a consistent and ongoing process.</td>
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<tr>
<td>Annual event, with a paper based manual process. No reporting or audit capabilities.</td>
<td>Ongoing process with integrated use of Workday, ease of recording performance progress and reporting capabilities.</td>
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<tr>
<td>Feedback cited in a number of exit interviews is lack of regular conversations with manager about performance or career development are a primary reasons for leaving Brandeis.</td>
<td>Frequent performance conversations initiated by manager with staff on development and performance, to increase engagement and retention.</td>
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<tr>
<td>No direct connection between performance and salary changes.</td>
<td>Workday functionality will align performance process with salary changes.</td>
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TAP’s Core Components and Program Goals

A reimagined program to foster a **culture of feedback and engagement** in support of our shared mission to attract, retain and develop staff.

A **proactive and forward-looking people approach** to help staff and managers with their ongoing engagement and development work.

A branded, **consistent and efficient program** to improve and replace the current inconsistent performance review and talent management processes.

A critical Brandeis initiative advancing the HR strategy to **attract, retain and develop talent** in a competitive labor market.

An initiative to empower **staff to take control of their career growth** by leveraging regular discussions, guidance and support from their managers.

An automated and streamlined process using Workday functionality to support a **transparent, automated and collaborative** performance process and positive outcomes.

Brandeis’ **recognition of staff** contributions to the University mission, and the important **role of managers in talent development**.
A Gradual and Phased Implementation Approach

**PHASE 1** Mid-Year Review
- Scheduled for mid-November 2022 launch.
- A Workday automated and question based mid-year review with workflow and audit capabilities.
- Process and systems training for leaders, managers and staff.

**PHASE 2** Annual Review
- Scheduled for April 2023 launch.
- A Workday automated and formal year-end performance review with workflow and audit capabilities.
- Process and systems training for leaders, managers and staff.
- Connected to merit process.

**PHASE 3** Merit Process
- May 2023 launch.
- Integrate annual review process and ratings with merit changes in Workday.
- Leverage learnings from 2022 cycle.
- Process and systems training for leaders, managers and staff

ONGOING FEEDBACK AND PERFORMANCE CONVERSATIONS
Process timeline August 2022 – July 2023

Aug. - Sept. 2022: Leadership Awareness, Community Awareness

Oct. - Dec. 2022: Mid-Year Review

Jan. - March 2023: Annual Review, Merit Process

April - May 2023: Manager and Staff Ongoing Check-Ins

Manager and Staff Training

System Training

Office Hours

Communications (Memos, FAQs, website, InBrief)

Manager and staff objectives. Training and Communication objectives.
TAP Performance Engagement: Tools for Success
## Shared Responsibility for Effective Performance Engagement

<table>
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<tr>
<th>Managers</th>
<th>Staff</th>
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<tr>
<td>Provide ongoing, fair and accurate feedback.</td>
<td>Engage in ongoing conversations and listen for understanding.</td>
</tr>
<tr>
<td>Emphasize strengths and areas of focus.</td>
<td>Demonstrate strengths and work on areas of improvement.</td>
</tr>
<tr>
<td>Instill a culture of communication, engagement and feedback.</td>
<td>Participate in open and transparent communications.</td>
</tr>
<tr>
<td>Demonstrate a commitment to staff development.</td>
<td>Ask for and embrace development needs or opportunities.</td>
</tr>
<tr>
<td>Provide solutions to day-to-day challenges.</td>
<td>Identify areas where you need help and accept support for change.</td>
</tr>
<tr>
<td>Clarify performance expectations.</td>
<td>Take responsibility for performance.</td>
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Benefits of Performance Feedback

**Transparency**
- Staff want to know where they stand.
- What is working well and areas for improvement.
- Ongoing conversations to strengthen the relationship between manager and staff.

**Organizational Objectives**
- Helps staff connect their contributions to department and University priorities, and DEI initiatives.
- Consistent approach to recognize and reward strong performance.

**Prioritization**
- Helps staff focus their time and energy towards key objectives and measurable goals.
- Allows for agile prioritization of work.

**Strengths**
- Helps to identify key strengths and how to leverage these in the position.
- Identify where to focus development efforts.
- Provides clarity on career growth.

**Course Correction**
- Ensures that honest feedback is delivered rather than having issues ignored.
- Allows for course correction to get back on track.
Role of Staff in TAP
Check-Ins

✓ Ongoing meetings with managers. Should take place weekly or semi-weekly.

✓ Workday functionality not needed. Keeping notes may be helpful for the mid-year and annual reviews.

Mid-Year Review

✓ Six month review of staff performance – November.

✓ Simple, automated form, enabled in Workday. Staff and manager have input; manager selects status (on track/not on track).

Annual Review (training provided in 2023)


✓ Automated form, enabled in Workday. Staff and manager have input; manager selects rating. Ratings connected to salary changes.
<table>
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<tr>
<th>Plan</th>
<th>Active Listening</th>
<th>Ask Questions</th>
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<tbody>
<tr>
<td>• Decide with manager what cadence (day/time) is best.</td>
<td>• Avoid distractions.</td>
<td>• Be curious, ask questions.</td>
</tr>
<tr>
<td>• Work with manager to schedule reoccurring meetings. Stick to them.</td>
<td>• Listen to understand.</td>
<td>• Identify barriers to accomplishing goals or objectives.</td>
</tr>
<tr>
<td>• Prepare updates on progress towards goals or objectives.</td>
<td>• Focus on objectives and desired results.</td>
<td>• Discuss opportunities for sharpening skills and supporting career development.</td>
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<tr>
<td></td>
<td>• Ask clarifying questions if needed.</td>
<td></td>
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<tr>
<td></td>
<td>• Don’t be afraid to ask for help if needed.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Manage expectations with manager.</td>
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Summary:

• A formal assessment of staff performance and a reflection of the ongoing check-in meetings through the mid-way point of the performance period (July – June).

• Simple, question-based format, enabled and recorded in Workday. Staff and manager have input; manager selects performance status (on track/not on track).

Areas of Focus – Past and Future:

<table>
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<tr>
<th>Performance to Date</th>
<th>Future Focus</th>
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<tbody>
<tr>
<td>❖ Status of goals and objectives.</td>
<td>❖ Areas of focus on in the next six months.</td>
</tr>
<tr>
<td>❖ Accomplishments and areas of improvement.</td>
<td>❖ What support is needed for success.</td>
</tr>
<tr>
<td>❖ Effectiveness of check-ins.</td>
<td>❖ Relationships to strengthen; ways to help others.</td>
</tr>
<tr>
<td>❖ Contributions to University or department mission/goals, and DEI objectives.</td>
<td>❖ Strengths or skills that can be leveraged.</td>
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TAP Core Components: Mid-Year Review

Timeframe:

- *Workday opens in mid-November and will close January 13.* HR will notify staff and managers of open and close dates.

Steps and Sequencing:

<table>
<thead>
<tr>
<th>Step</th>
<th>Staff</th>
<th>Manager</th>
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<tbody>
<tr>
<td>1</td>
<td>Staff member completes questions in Workday. Submits.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td>Manager receives email indicating that staff input has occurred.</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td>Manager completes questions in Workday on staff performance.</td>
</tr>
<tr>
<td>4</td>
<td>Discussion with manager.</td>
<td>Manager discusses their input with staff. Agreement on content and status achieved BEFORE submitting.</td>
</tr>
<tr>
<td>5</td>
<td></td>
<td>Manager finalizes status (on-track or not on-track), records attestation and submits.</td>
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Preparing for your Mid-year Review

- Keep a list of quantifiable data and/or examples related to meeting your job responsibilities and goals, as well as outcomes discussed during the check-ins.

- Document status on deliverables and ongoing projects. Reflect on your performance over the past 6 months and think about what you want to accomplish in the next 6 months.

- Document positive feedback from others, including verbal feedback as well as emails.

- Document any initiatives you took above and beyond your job description and how they supported Brandeis or your department.

- Review in advance the questions that will be in the Mid-Year Review (available on TAP website).
Mid-Year Review Meeting Tips

➢ Listen for understanding, take notes and ask clarifying questions regarding feedback and the evaluation.

➢ Be prepared and provide data and/or examples to document your response.

➢ Be sure your job description is up-to-date and reflects the work that you are doing. Discuss with your manager if you have questions.

➢ If there are challenges, barriers or surprises to you being successful in your role, discuss with your manager and set clear expectations for improvement or development.

➢ Identify the specific items that you will do, or that you need, for successful career development in the future.
Mid-Year Review Workday Functionality*

Employee completes mid-year review self evaluation in Workday.

As part of this year's performance management process, please complete the following form and discuss it with your manager. Your input in the review process is important. This is your opportunity to let your manager know about your job performance, accomplishments and your career and/or professional development goals.

**Performance to Date**

**Question**

What are your key goals and objectives and to what extent have you been able to achieve them? Are you encountering any obstacles and how can these be resolved?

**Employee Evaluation**

*Prototype screenshots for training. Actual functionality may vary.*
Mid-Year Review Workday Functionality*

Manager provides feedback and schedules meeting with employee.

Performance to Date

Question
What are your key goals and objectives and to what extent have you been able to achieve them? Are you encountering any obstacles and how can these be resolved?

Manager Evaluation

Employee Evaluation

Provide complete, detailed answers.

Question
What accomplishments are you most proud of so far this year? Are there areas that you feel you can improve on?

Manager Evaluation

Employee Evaluation

* Prototype screenshots for training. Actual functionality may vary.
**Mid-Year Review Workday Functionality***

* Prototype screenshots for training. Actual functionality may vary.
✓ Workday System Training: October - November

✓ Office Hours/Drop in Sessions: November - December
Resources

- TAP Website

- Training for Managers and Staff

- Job Aids/Step by Step Guides for Using Workday Performance

- E-learning – videos that walk you through Workday System

- LinkedIn Learning Library of Videos for Staff

- Recommended Articles for Staff
Resources - HR Business Partners

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