

# Performance Management Process

## Annual Performance Management Process Procedures (For Supervisor)

- I. **Supervisor Notification** – Below you will see the email that each supervisor will receive at the beginning of each **Annual Performance Evaluation Cycle**. This process will occur each year at the beginning of the academic cycle. Remember to review the employees **Employee Awareness Profile** to assist you in building your direct reports **goals and objectives** for the upcoming evaluation period. By clicking on the link provided on the email the supervisor will enter the process at its current stage.

*Dear Manager Performance:*

*Bobby Employee has **completed their Employee Awareness Profile in EKU's Performance Management System**. Please log in to the system and begin building your employee's **Goals & Objectives** for the evaluation period (the current academic year).*

*Remember to review your employee's Awareness Profile and keep their requests for additional mentoring and developmental needs in mind as you create goals for your employee for the evaluation period.*

*Please complete this goal setting stage by Oct 9, 2022.*

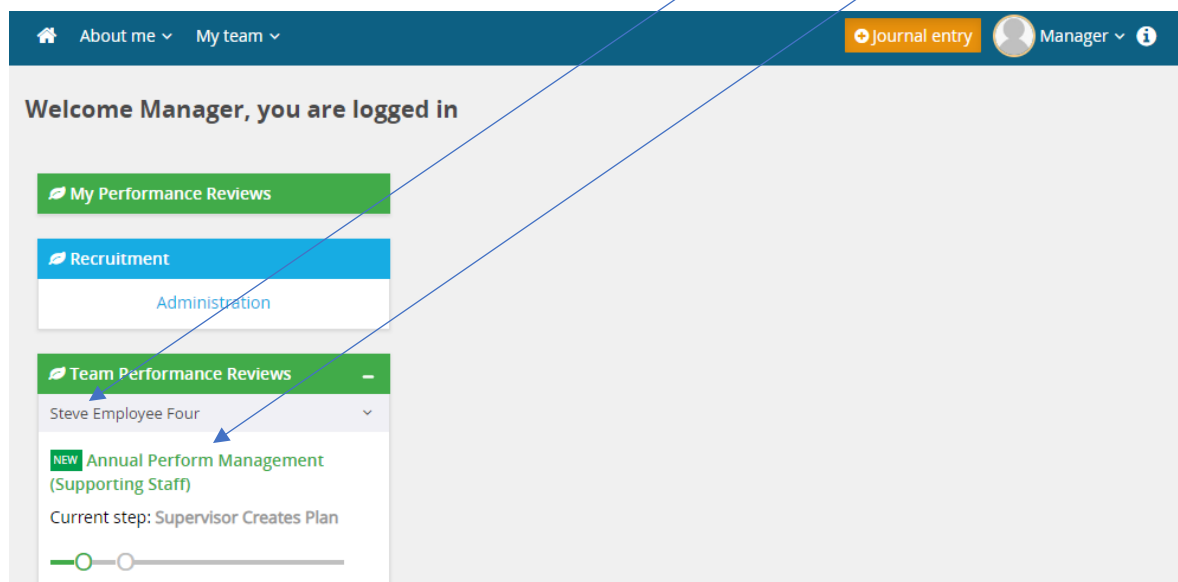
*Click the following link to access the system [Click here](#).*

*Please contact your Human Resources Business Partner if you have any questions or need some additional assistance. Human Resources can also be contacted directly at (859) 622-5094.*

*Thank you so much!*

*Human Resources*

- II. After clicking on the link, you will find yourself on the main page for the Performance Management System. Under the section titled **Team Performance Reviews** select the **Annual Perform Management process** at the stage of "**Supervisor Create Plan**" for the given employee. Remember that you should have reviewed the **Employee's Awareness Profile** that you will also find located in the **Team Performance Reviews section**.



- a. Once you have clicked on the process you will find yourself inside the annual evaluation form. On the **Start** page you will find some introductory information concerning the annual process that should help you progress through the system. You will also notice the sections across the top. You can navigate through each section by clicking on the tabs or you can click the **Next** button in the lower right-hand corner of each page.

The screenshot shows the 'Start' page of the 'Steve Employee Four - Annual Perform Management (Supporting Staff)' form. At the top, there is a navigation bar with five tabs: 'Start', 'Strategic Priorities', 'Guiding Values', 'Goals & Objectives', and 'Next steps'. The 'Start' tab is currently selected. Below the navigation bar, there is a main content area with a welcome message and instructions. At the bottom right of the content area, there is a 'Next' button with a right-pointing arrow. A blue arrow from the text above points to the 'Start' tab, and another blue arrow points to the 'Next' button.

**Steve Employee Four - Annual Perform Management (Supporting Staff)**

Start Strategic Priorities Guiding Values Goals & Objectives Next steps

Actions ▾

Welcome to the **next stage** of EKU's performance management process!

At this time your employee should have completed their **Employee Awareness Profile** assessment and together you and your employee should have reviewed this assessment, focusing on the University's Strategic Priorities and Guiding Values as well as how your employee plays a critical role in strengthening these priorities and values **in pursuit of excellence** for themselves and for the University.

The next phase of the performance management process is **establishing goals** with your employee for the coming evaluation period (the current academic year). Critical to managing your employee's performance and fostering their excellence is setting thorough goals and objectives. If you're ready to begin building goals, **click on the "Goals & Objectives" tab above**. You're encouraged to **review the University's Strategic Priorities and Guiding Values** beforehand (simply click on those tabs as needed). Remember, as you're building your goals **save your work** so you don't lose your progress.

If you have any questions or need any assistance, please contact your Human Resources Business Partner.

Good Luck planning!

Next →

- b. As you move through the tabs you will be able to review what areas the employee will be reviewed on during the annual process, however for this initial step of **establishing goals** you will only need to complete the **"Goals & Objectives"** tab. You can either click on that tab directly or hit the **Next** button.

The screenshot shows the 'Goals & Objectives' page of the 'Steve Employee Four - Annual Perform Management (Supporting Staff)' form. The navigation bar at the top is the same as in the previous screenshot, but the 'Goals & Objectives' tab is now selected. Below the navigation bar, the page title is 'Goals & Objectives'. There is a 'Saved' indicator (a green checkmark) and an 'Actions' dropdown menu. The main content area contains instructions on how to set goals and a list of items to remember when setting goals for employees. A blue arrow from the text above points to the 'Goals & Objectives' tab.

**Steve Employee Four - Annual Perform Management (Supporting Staff)**

Start Strategic Priorities Guiding Values Goals & Objectives Next steps

Goals & Objectives ✓ Saved Actions ▾

In this section the supervisor and employee **establish goals** for the employee to pursue during the evaluation period (the current academic year). These goals are determined by discussion between the employee and supervisor. The supervisor will enter the agreed-upon goals below. At the conclusion of the evaluation period, the supervisor will rate their employee's efforts toward achieving these goals as well as the employee's efforts toward satisfying the University's Strategic Priorities and Guiding Values. Once the supervisor has established goals for the employee, the goals will be forwarded to the employee for their acknowledgment.

**To enter a goal, the supervisor must click "Add goal" below.**

Items to remember when setting goals for employees:

- Goals should encourage employee **EXCELLENCE**.
- Goals should be SMART, meaning **Specific, Measurable, Attainable, Realistic, and Time-Oriented**.
- Goals should include the **DUE DATE** or **TIMELINE** within the goal description so the employee will know when completion is expected.
- Employee should participate in drafting the goals.
- There should not be too many goals or too few (a suggested number is three-to-five SMART goals).
- Goals should encourage the employee to stretch, not to just satisfy general job expectations.
- The supervisor should review their employee's **Employee Awareness Profile** and incorporate their training and developmental requests.

- c. Once on the “Goals & Objectives” tab you will find some instructional text to assist you with building the employees goals for the upcoming evaluation period. At this time, you have the ability to add goals by clicking on the **Add Goals** button. Enter the title of the goal and a description of the expectations for this goal. Continue to add goals as needed. As you complete each goal remember to hit the **Save** button.

Goals & Objectives ✔ Saved Actions ▾

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**You must hit “SAVE” for each goal or it will not save it.**

**REMINDER!** The **Employee Awareness Profile** can be found in the same area as this Performance Management Process. If an employee has failed to complete their Awareness Profile, they should either be reminded to complete it or given an overview of the Strategic Priorities and Guiding Values to determine their level of understanding or need of development.

Happy planning!

**DON'T FORGET TO SAVE EACH GOAL!**

**+ Add Goals**

Item title 🗑

Title\*

Description **B I U** | | | | | | | | Source

Complete goal number one by October 31, 20XX.

Status

**Save**

- d. Once you have completed setting up all the goals for this employee hit the **Next** button and move onto the **Next steps** tab. Here you will see a summary page and you can review the goals you have created by clicking on the **Goals & Objectives** summary section. If you are ready to move the process on to the next step "**Supervisor meets with Employee to discuss plan**" you can click on the **Go to next step** button.

The screenshot shows the 'Steve Employee Four - Annual Perform Management (Supporting Staff)' interface. At the top, there is a breadcrumb navigation: Start > Strategic Priorities > Guiding Values > Goals & Objectives > Next steps. Below this, there is a section for 'Overall rating' with five stars and the text 'Not rated'. A 'Summary' section is visible, with 'Goals & Objectives' expanded to show '1. Goal One'. On the right, a 'Your next step: Supervisor meets with Employee to discuss plan' notification is displayed, along with a progress bar and a 'Go to next step' button. A warning message states: 'Clicking "Go to next step" will move this review to the next step and you will be unable to return to this step'. The 'Last saved' timestamp is 23 Aug 2022, 2:39pm.

- e. At this point you will schedule a goal setting meeting with your employee. You should walk through the process inside the system discussing each section, providing the expectations for the upcoming year and answering any questions the employee may share with you. Finally go over the **goals and objections** with your employee and make any edits that may come up during the discussion. When you have completed your discussions, you can hit the **Go to next step** button and move it to the **Employee Acknowledges the Plan** step.

The screenshot shows the 'Steve Employee Four - Annual Perform Management (Supporting Staff)' interface. At the top, there is a breadcrumb navigation: Start > Strategic Priorities > Guiding Values > Goals & Objectives > Next steps. Below this, there is a section for 'Overall rating' with five stars and the text 'Not rated'. A 'Summary' section is visible, with 'Strategic Priorities' expanded to show a list: '1. Knowledge', '2. Innovation', '3. Transformation'. On the right, a 'Your next step: Employee Acknowledges Plan' notification is displayed, along with a progress bar and a 'Go to next step' button. A warning message states: 'Clicking "Go to next step" will move this review to the next step and you will be unable to return to this step'. The 'Last saved' timestamp is 24 Aug 2022, 8:04am.

- III. **Annual Performance Management Process Timeline** - Congratulations on completing the initial stages of the process and for sharing the plan with your employee. Moving forward you will continue to get notification emails when a new stage is ready for you to complete, and you will simply click on the link provided to be brought back into the system. You will continue to navigate through the process and take the appropriate actions as described in the instructional text at each stage of the process. Below you will see the upcoming timeline for the Annual Performance Management process.

Timeline Period & Stage	Description
<b>January 2023 – Mid-Year Check-in</b>	No entries are made in the system at this stage; however, you are responsible for going into the system and move the <b>Annual Performance Management process</b> to the next stage <b>“Supervisor Completes Year-End Evaluation”</b> .
<b>March/April 2023 – Supervisor Completes Year-End Evaluation;</b>	At this stage you will build the Year-End Evaluation by moving through the sections <b>Strategic Priorities, Guiding Values and Goals &amp; Objectives</b> and entering your rating on each item. Further information will be provided within the system at each stage and further tutorials will be available as we move closer to the end of the annual period.
<b>April 2023 – Next Level Supervisor Review</b>	When you have completed your initial review for your employee you will forward the process to your direct supervisor for their review and to provide any additional input to the evaluation.
<b>May 2023 – Supervisor Meets with Employee</b>	Time again to schedule your meeting with your employee to walk through the sections and share you evaluation. Once you have completed this stage remember to hit <b>Go to next step</b> .
<b>June 2023 – Employee Acknowledges Year-End Evaluation</b>	At this stage your employee will be asked to acknowledge that they have met with you and had a chance to review their annual evaluation.