# The 2017 Performance Evaluation Process

The 2017 Performance Evaluation Process will launch the week of March 27. It has been substantially revised this year, with changes to the process for completing the form and the evaluation criteria. As always, the goal of a performance development process is to provide staff with meaningful feedback about work performance and to identify opportunities for continued professional growth.

## REVISED COMPETENCIES & EVALUATION RATINGS

Brown's new annual evaluation forms were rolled out earlier this year. Required core competencies now better define a set of institutional expectations for all staff. In addition, the performance scale was revised from a five-point scale to three rating options.

The updated competencies and ratings are intended to prompt better, more comprehensive conversations about employee performance without undue attention to whether an overall rating "meets" or "at times exceeds" expectations. With a three-point scale of ***exceptional***, ***effective***, and ***requires improvement,*** it becomes clearer that performance that is effective overall will include high and low variations. *Regular conversations between managers and direct reports to discuss where individual performance sits within the effective range are critical.*

## CHOICE OF ANNUAL FORMS

To keep the focus on clear and more helpful conversations, two options are now available to document performance. The form used to structure the conversation should help rather than hinder performance discussions between managers and their direct reports.

- The ***Competency-Based Evaluation Form*** is most similar to appraisal forms Brown has used in the past. This option requires a rating for each core competency (and managerial competencies for those who manage staff) with an opportunity to add comments to explain each rating. An overall performance rating with comments is also required.

- The ***Narrative Evaluation Form*** requires only one overall rating, with core competencies discussed through responses to four performance-related questions.

## THE EVALUATION PROCESS IN WORKDAY

A Competency-Based Evaluation Form will be delivered to your Workday inbox for each employee in your supervisory organization. Annual reviews will not be delivered

for seasonal/intermittent staff; however, you may request them from your HR Consultant. Upon request, the Narrative Evaluation Form can replace the Competency-Based Form. You should use the same form template for all of your similarly-situated staff.

Upon receiving the performance evaluation form, if you have not already done so, request a self-appraisal from each of your direct reports. A self-appraisal form is available from the University Human Resources website. That document provides a good starting point for self-assessment, but you may prefer to add supplemental items, or even ask a different set of questions to prompt more insight into the way your direct reports think about their own performance during the past year.

A best practice is to complete a draft appraisal in Workday and use the Save for Later functionality to print out your draft and make changes.

When you submit the form, it will route to a Workday Performance Partner (if one has been identified for your department) or to University Human Resources (UHR) who will review all appraisals submitted by all managers in your department or division. This will ensure that performance assessments align well to the standard set for staff in your area. *This year, performance appraisals will not route to your manager or department head.*

When the performance evaluation is returned to you, no additional changes will be possible. Print a version to share and discuss with your staff member. After your meeting, submit the form so your staff member may acknowledge and comment. This acknowledgement process will allow comments to be added to reflect any changes you mutually agree to make.

Until the form is routed to the staff member in Workday, he or she will not be able to see the form. In addition, if the Performance Partner has used the comment field, those comments will not be viewable/visible to the staff member.

After the form is acknowledged by the staff member, you will be able to confirm any comments made to the document and agreed upon changes; UHR will then finalize the form. At that point, you and the staff member will be able to access and view the completed Annual Staff Performance Evaluation document in Workday. The automated workflow will reduce the need to store multiple copies in separate files, and will ensure that completed forms are attached and accessible on the staff member's Workday record.

**RESOURCES**

A job aid has been developed to assist you in navigating the performance development process in Workday. In addition, please register for one of the performance process demonstrations UHR is hosting:

| Date | Time | Location |
|---|---|---|
| March 20 | 1:00 – 2:30 | Marcuvitz Auditorium, Sydney Frank Hall |
| March 21 | 10 – 11:30 a.m. | 70 Ship Street, Room 107 |
| March 24 | 3 – 4:30 p.m. | Chancellor's Dining Room, Sharpe Refectory |

Open labs are also scheduled in Room 269 of the CIT to assist you in completing the evaluation; no registration is required:

| Date | Time |
|---|---|
| March 29 | 10 a.m. – 12 p.m. |
| March 30 | 1 – 3 p.m. |

If you have questions about the annual staff evaluation process, please email toni_tinberg@brown.edu or any of the HR Consultants listed in the Employment/HR Services section of the UHR Staff Directory.