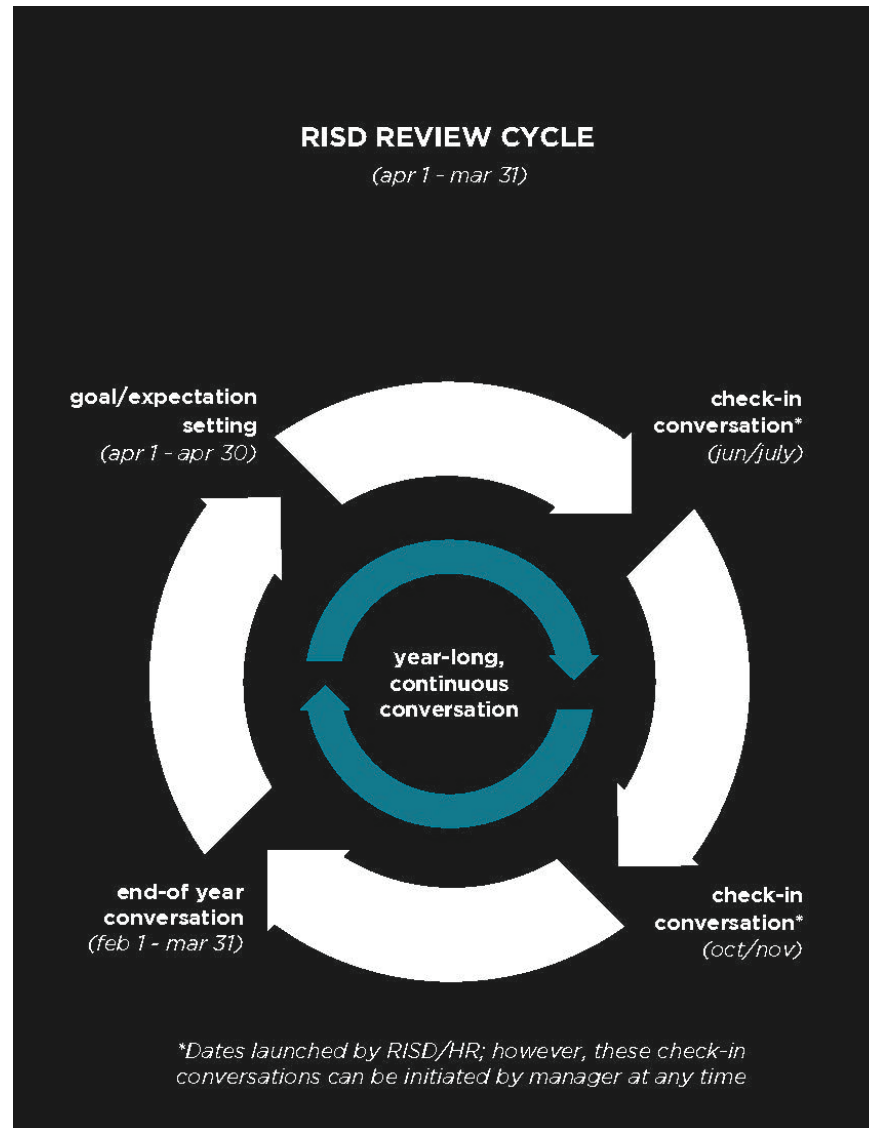# END-OF-YEAR CONVERSATIONS:
Philosophy and Process

RHODE ISLAND SCHOOL OF DESIGN I HUMAN RESOURCES

Today's Objectives

- Review RISD's Performance Management Cycle
- Review RISD's End-of-Year Conversation process
  - Highlight new features
- Understand the importance of End-of-Year Conversations to overall employee success
- Develop a deeper understanding of how to effectively engage in performance-based conversations
- Engage in conversation prep and dialogue around End-of-Year Conversations
- Review Workday tools

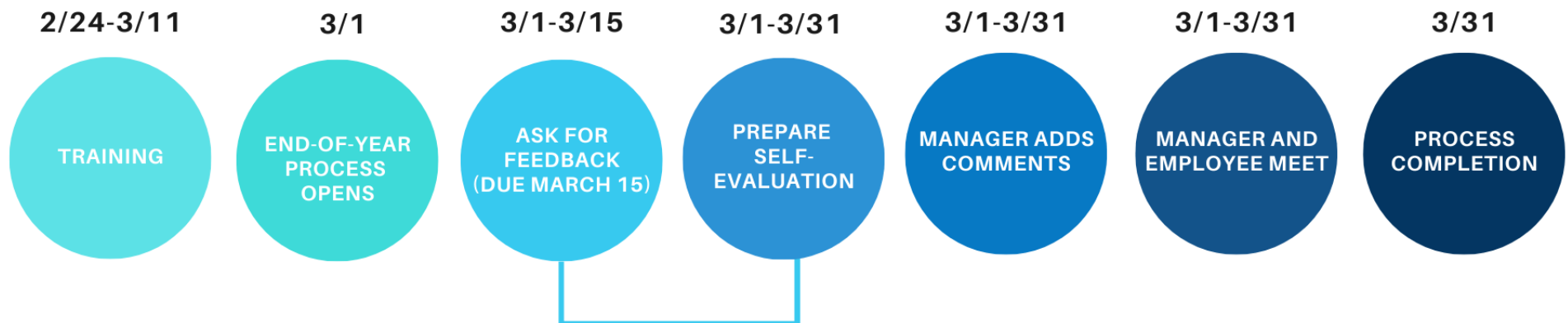# RISD's Performance Management Cycle

What is the End-of-Year Conversation and Why Does It Matter?

- A documented summary conversation that reflects on overall performance throughout the past year.

- Provides the opportunity to engage in two-way dialogue about:
    - Recognize accomplishments
    - Discuss performance highlights, challenges, and opportunities
    - Review efforts related to RISD's Competencies
    - Begin to discuss goals/expectations for the coming year (or refinements to continuing goals/expectations)

- Focus should be on quality of the conversation, *not* the process

End-of-Year Conversation: The Process

RISD END-OF-YEAR CONVERSATION PROCESS
2/24-3/31

2/24-3/11	3/1	3/1-3/15	3/1-3/31	3/1-3/31	3/1-3/31	3/31
TRAINING	END-OF-YEAR PROCESS OPENS	ASK FOR FEEDBACK (DUE MARCH 15)	PREPARE SELF-EVALUATION	MANAGER ADDS COMMENTS	MANAGER AND EMPLOYEE MEET	PROCESS COMPLETION

The End-of-Year process includes the following elements:

- Get Feedback (Manager requests peer feedback – optional)

- Employee Self-Evaluation

- Manager Evaluation

- Employee/Manager Conversation

- Employee/Manager Acknowledgement and Final Comments

Discussion Opportunity

Have you requested feedback from stakeholders or peers/colleagues regarding your employee's performance in the past during End-of-Year Reviews?

If yes, how have you engaged in this process?

How have you used this feedback to enhance your conversations? To aid in employee development?

Feedback

- Essential for supporting the employee's professional growth and the growth of the institution

- Enables a more well-rounded understanding of the employee's contributions in the workplace
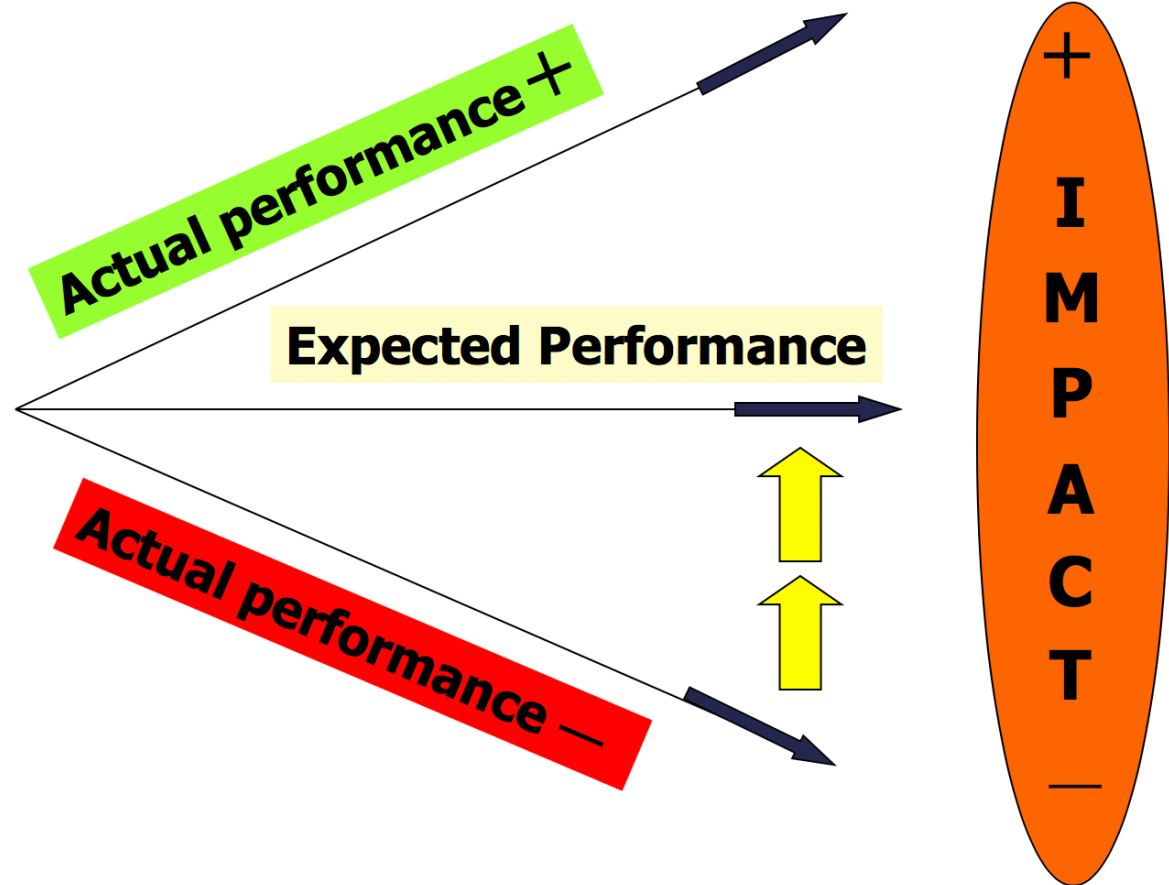
3/1-3/15

ASK FOR FEEDBACK (DUE MARCH 15)

Engaging in Effective Performance Conversations

- Most effective feedback is **CLEAR** and includes the following three (3) elements:
  - *Expected performance*
  - *Actual performance*
  - *Impact* or why it matters

Actual performance +

Expected Performance

Actual performance −

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Feedback

- *Get Feedback* is initiated by the manager to invite/request feedback
  - While optional, managers are encouraged to utilize this feature
  - Only 2-3 requests to peers and colleagues

- **Feedback collected via the *Get Feedback* function is only visible to the manager**

- Manager and employee should work together to mutually identify individuals who can provide first-hand perspective

- **Feedback requests should be sent in Workday by March 5, 2021**

3/1-3/15

ASK FOR FEEDBACK (DUE MARCH 15)

Get Feedback in Workday

Get Feedback
Actions

4 minute(s) ago - Effective 03/31/2021

__Please request feedback by Friday, March 5, 2021__ to provide ample time for the feedback provider to respond and for you to complete the End-of-Year process with your employee by March 31, 2021.

TO GET STARTED: Select the worker(s) that should provide feedback for this employee. Enter the name(s) of the worker(s) that you wish to provide feedback on the employee in the For Workers field. Multiple workers may be selected. Once this task is submitted, you will not be able to add additional names.

__Important:__
__Be sure to maintain the 'Don't share with' option below, which ensures the feedback is shared only with you, the requester.__

__In the Feedback Template field, do not remove the defaulted 'Feedback On Worker - Locked Template'.__

From Workers *
- × Cassie Goryl ···
- × Alison Douglas ···
- × Kimberly Lima ···

Feedback Sharing

- ● Don't share with Alicia Luzon
- ○ Share with others

Questions

Feedback Template
- × Feedback On Worker - Locked Template

Question * __Please discuss your experience working with this employee.__

Process History

Liz Rainone   4 minutes ago
Start Performance Review – Step Completed

Submit   Save for Later   Cancel

Reviewing Feedback in Workday - Profile

Feedback Requested   Feedback Received

Feedback Requested 1 item

	Question	Status	Request Date	From	Feedback	Confidential: Not Shared with Feedback Recipient
🔍	**Please discuss your experience working with this employee.**	Completed	02/13/2020		This employee is a true professional. They are prompt, responsive, and I am always confident that I will get a reliable, accurate response from them. Key projects we have worked on, which were completed before the deadline and with great result include: • Project XYZ for Department ABC • New Initiatives Initiative • 3 searches for vacant positions • 6 position description rewrites I enjoy working with them and look forward to collaborating on future projects.	Yes

Actions

📞 Phone   ✉ Email   🗂 Team

▦ Summary
🧰 Job
📊 Compensation
🛡 Benefits
🗓 Time Off
🖼 Contact
👤 Personal
📊 Performance
◎ Career
★ Feedback

Reviewing Feedback in Workday – Employee Self-Evaluation

Complete Manager Evaluation

Manager Evaluation: ▮▮▮▮▮▮▮▮▮▮▮ (Actions)

49 second(s) ago · Effective 03/31/2020

Review Period
02/01/2020 - 03/31/2020

Feedback ⌄

Question

Question
Please discuss your experience working with this employee.

Feedback

Feedback
This employee is a true professional. They are prompt, responsive, and I am always confident that I will get a reliable, accurate response from them. Key projects we have worked on, which were completed before the deadline and with great result include:

- Project XYZ for Department ABC
- New Initiatives Initiative
- 3 searches for vacant positions
- 6 position description rewrites

I enjoy working with them and look forward to collaborating on future projects.

From

▮▮▮▮▮▮▮▮

Giving Feedback in Workday

- Any employee who receives a request to provide feedback for a colleague may opt out of this process

- Will be asked to provide a reason for declining participation

- While participation is optional, employees are encouraged to provide feedback regarding their peers upon request

- **Feedback is <u>only</u> visible to the requesting manager**

Giving Feedback in Workday

Give Feedback
Alison Douglas `Actions`

Requested by: Liz Rainone On: 03/03/2021   5 second(s) ago

Please complete this task to provide your feedback on this worker by Monday, March 15, 2021.

Feedback is essential for supporting the employee's professional growth and the growth of the institution. Employees at RISD often work closely with stakeholders and colleagues who can provide valuable perspectives about the employee's contributions, as well as opportunities for growth and development to enhance their performance.

Colleague feedback is not intended to serve as a substitute for the manager's perspective, but rather, enables a more well-rounded understanding of the employee's contributions.

Your feedback will not be shared with Alison Douglas.

Question	Please discuss your experience working with this employee.
Feedback	
Decline?	☐

Process History

Cassie Goryl
Give Requested Feedback– Awaiting Action

[Submit] [Save for Later] [Decline All] [Cancel]

Discussion Opportunity

How have you prepared for your self-evaluations in the past?

Any tips or techniques to share?

Employee Self-Evaluation

- Employee perspective is critical to ensure the manager can provide meaningful performance feedback

- Not intended to be an exhaustive list of work from the prior year

- Should capture:
    - Accomplishments and results achieved related to Goals/Expectations/Development Activities
    - Challenges and missed opportunities faced and their impact on performance
    - Performance against RISD Competencies

3/1-3/31

PREPARE SELF-EVALUATION

Employee Self-Evaluation in Workday

02/01/2020 - 03/31/2020

Goals/Expectations and Development Activities ⌄

Click 'Add' to input review content. Check 'Use Existing Goals' to pull from a list of valid goals for selection.

For employees: Review each goal/expectation and/or development activity and describe what was accomplished during the year. Employees are encouraged to examine and document not only "what" was accomplished, but also "how" the work was approached using RISD's competencies.

For managers: Review each goal/expectation and/or development activity when summarizing the past year. In addition to what was accomplished, the manager should also describe how the job was performed using the behaviors described by RISD's competencies.

Use Existing Goal

☑

search   ☰

✕ Redesign and implement a   ...
   further streamlined RISD at
   Work Newsletter, adapting
   content to meet the design
   elements of new email
   template.

Goals/Expectations and Development ★

| Format ⌄ | **B** | *I* | U̲ | A ⌄ | ☰ | 🔗 |

Redesign and implement a further streamlined RISD at Work Newsletter, adapting content to meet the design elements of new email template.

Employee Self-Evaluation in Workday (cont.)

02/01/2020 - 03/31/2020

Questions ˅

To input your response, click the pencil icon to the right of each prompt to begin editing.

Prompt
Highlight any areas of accomplishment, milestones, or relevant updates.

Employee Evaluation

Response

Prompt
Highlight any challenges you experienced or goals/expectations that haven't gone as planned/need refinement. Highlight any resources or support you need from your manager to be most effective in your role.

Employee Evaluation

Response

Prompt
Briefly describe recommended goals/expectations or provide suggestions for the refinement of existing goals/expectations for the coming period.

Employee Evaluation

Response

Back   Next

Manager Evaluation: Comments and Feedback

- Manager perspective is critical to overall employee growth and development
  - Consider feedback received in responses
- Managers should consider the same body of work as the employee when preparing their responses
  - What was expected?
  - What was accomplished?
  - What obstacles emerged?
  - How the employee demonstrated RISD's competencies in their work.

3/1-3/31

MANAGER ADDS COMMENTS

Manager Evaluation: Comments and Feedback (cont.)

Goals/Expectations and Development Activities ⌄

Click 'Add' to input review content. Check 'Use Existing Goals' to pull from a list of valid goals for selection.

For employees: Review each goal/expectation and/or development activity and describe what was accomplished during the year. Employees are encouraged to examine and document not only "what" was accomplished, but also "how" the work was approached using RISD's competencies.

For managers: Review each goal/expectation and/or development activity when summarizing the past year. In addition to what was accomplished, the manager should also describe how the job was performed using the behaviors described by RISD's competencies.

Goals/Expectations and Development ★

Redesign and implement a further streamlined RISD at Work Newsletter, adapting content to meet the design elements of new email template.

Anticipated Outcome/Description

This goal is contingent upon the release of a new email template, which is being designed by RISD's Media Group. Taylor has indicated that the team has the capacity to put together a new template, and it should be made available sometime this fall. Immediate implementation anticipated once template is received.

Update: Meeting scheduled for 2/4/20 to review final template from Media. Expecting to begin utilizing for February 2020 edition.

Due Date

02/28/2020

Status

In Progress

Manager Evaluation

Comment

Employee Evaluation

Comment

This was a great initiative to be part of this year. I had the opportunity to work collaboratively with partners across the college, and we completed this project prior to the anticipated deadline. Feedback has been overwhelmingly positive to the new design. In considering this goal, I believe I effectively utilized RISD's competencies of Communication and Collaboration and Teamwork through open, productive dialogue and working effectively across departments to incorporate new ideas and embrace innovative concepts as presented by my peers.

Back   Next

Manager Evaluation: Comments and Feedback (cont.)

To input your response, click the pencil icon to the right of each prompt to begin editing.

Prompt
Highlight any areas of accomplishment, milestones, or relevant updates.

Manager Evaluation

Response
You did a great job this year!

Employee Evaluation

Response
Test text. Test text. Test text. Test text. Test text. Test text. Test text. Test text.
Test text. Test text. Test text. Test text. Test text. Test text. Test text. Test text.
Test text. Test text. Test text. Test text. Test text. Test text. Test text. Test text.
Test text. Test text. Test text. Test text. Test text. Test text. Test text. Test text.
Test text. Test text. Test text. Test text. Test text. Test text. Test text. Test text.
Test text. Test text. Test text.

Prompt
Highlight any challenges you experienced or goals/expectations that haven't gone as planned/need refinement. Highlight any resources or support you need from your manager to be most effective in your role.

Manager Evaluation

Response

Employee Evaluation

Response
Test text. Test text. Test text. Test text. Test text. Test text. Test text. Test text.
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Test text. Test text. Test text. Test text. Test text. Test text. Test text. Test text.
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Test text. Test text. Test text.

Prompt
Briefly describe recommended goals/expectations or provide suggestions for the refinement of existing goals/expectations for the coming period.

Manager Evaluation

Response

Employee Evaluation

Response
Test text. Test text. Test text. Test text. Test text. Test text. Test text. Test text.
Test text. Test text. Test text. Test text. Test text. Test text. Test text. Test text.
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Test text. Test text. Test text.

Back   Next

Manager and Employee Conversation

3/1-3/31

MANAGER AND EMPLOYEE MEET

Complete To Do
Manager/Employee Meeting Required (Actions)

2 second(s) ago - Effective 03/31/2020

For

Overall Process

Overall Status   Successfully Completed

Instructions   **If you have not already done so, please meet with your employee regarding this review.**

Real-time conversation and a face-to-face meeting is crucial to employee development and growth.

By submitting this step, **you are confirming** that you have had a conversation with your employee.

Please do not submit until this conversation has occurred.

Once you submit this step, the employee will be able to view your comments on the review.

Manager and Employee Conversation

- Productive, two-way dialogue focused on expectations, actual performance, and impact, with a high degree of mutuality and understanding

- Opportunity to plan for development

- Sets the stage for the year ahead

3/1-3/31

MANAGER AND EMPLOYEE MEET

Manager and Employee Conversation

- Consider the following prompts as you prepare for your upcoming *End-of-Year Conversation(s):*

Employee	Manager
Here are the accomplishments and/or milestones I achieved.	Of the results achieved, which are the most impactful to the department and/or institution?
Here are some of the things that got in the way of my accomplishing goals or tasks.	What are some of the things that got in the way of achieving your task?
Here are examples of how the use of competencies had a positive impact on my performance.	In what ways did your use of competencies influence your performance?
Here are the resources or support needed to be the most effective in my role.	What resources or support do you need that will enable you to be most effective in your role?
Here are some recommended goals/expectations for the coming year. Here are some refinements to existing goals/expectations that will continue into the next performance review cycle.	Here's what's going to be most important (the goals/expectations) in the coming period. Here are some refinements to current goals/expectations that will continue into the next performance review cycle.

Final Steps: Acknowledgements

3/31

PROCESS COMPLETION

Provide Manager Review Comments
Manager Evaluation: Test for EOY Feb 13 CAG: Cassie Goryl (Actions)

Evaluated By   Liz Rainone

12 second(s) ago · Effective 03/31/2020

Acknowledgement

Manager Acknowledgement

Status *

× Acknowledge ···

Comment

| Normal ∨ | **B** | *I* | U | A ∨ | ☰ | 🔗 |

Thank you for an excellent year.

Employee Acknowledgement

Status
Acknowledge

Comment
Thank you for the thoughtful conversation. I am looking forward to the work we have planned for the year ahead.

Entered by
Cassie Goryl

Date
02/13/2020 04:17 PM

✓

Process Successfully Completed

End-of-Year Conversations: Workday Process Summary

- **Step 1**– HR initiates process in Workday.

- **Step 2a**– Employee receives Workday Inbox item to engage in *End-of-Year Conversation* process by completing the Self-Evaluation and submitting to their manager. Employee should be prepared to summarize goal/expectation and development activities, as well as respond to several prompt questions.

- **Step 2b**– Manager simultaneously receives Workday Inbox item to collect relevant feedback from the employee's peers and colleagues as part of *the End-of-Year Conversation* process.
  Note: *While feedback collection is optional, we strongly encourage that managers utilize this step.*

- **Step 2c**– Selected employees will receive a Workday inbox item to provide peer feedback at the request of the listed employee's manager.

End-of-Year Conversations: Workday Process Summary (cont.)

- **Step 3**– Manager receives Workday Inbox item to review received feedback and the employee's completed Self-Evaluation, and to provide their own comments and feedback. The manager should submit this task once complete to move to the next step.

- **Step 4**– Manager receives Workday Inbox item to schedule a date to engage in the End-of-Year Conversation with the employee. The manager **should not** submit this inbox task until *after* the meeting as occurred.

- **Step 5**– Employee receives Workday Inbox item to acknowledge that the End-of-Year Conversation has taken place and to provide additional comments, as necessary. The employee should submit this inbox task once complete to move to the manager for final steps.

- **Step 6**– Manager receives Workday Inbox item to acknowledge that the End-of-Year Conversation has taken place and to provide additional comments, as necessary. The manager should submit this inbox task once complete to finalize the process.

Questions?