2017 PERFORMANCE EVALUATION AND PLANNING PROCESS (PEP) FREQUENTLY ASKED QUESTIONS - PILOT

Q. What does the pilot testing entail?

A. Thank you for helping us test this new functionality! We are piloting technology that simplifies the PEP process by streamlining the completion, routing, and electronic filing of the forms. Based on your feedback and input, we look forward to rolling this out university-wide for use in future performance cycles.

NOTE: if you have NOT been specifically informed of your participation in the pilot, please click **here** for non-pilot information.

Q. As a pilot user, what changes will I notice? What's remaining the same?

A. You'll notice a few changes. First, you'll receive a customized email that lets you know when it's time for you to take an action in the system. You'll log in to the system, where you simply click on links to act on any pending tasks. All documentation (self-evaluations, manager evaluations, goal planning, in-person meeting information, and acknowledgements) is done in the system. However, you'll also see that the online form is almost identical to the paper form you used last year, so the actual change is to the process used to complete the PEP – not the PEP itself.

Q. Will I do anything different as a pilot user?

A. Yes. The first task you'll be assigned is the entry of your 2017 goals, taken from last year's paper version of your evaluation. This task is required for the first online evaluation ONLY to ensure the evaluation has your goal information for rating. In future years, the system automatically rolls the previous year's goals into the evaluation form. You'll receive an email notifying you when this task is ready for you and providing you resources to help you navigate this task quickly and successfully.

Q. Is the evaluation timeline or submission period changing?

A. There are slight changes to the timeline, which you can review **here**. The due date of March 1, 2018 is not changing.

Q. Who's required to complete a self-evaluation?

A. US-UNM eligible employees *must* complete a self-evaluation in accordance with Article 36. Performance Review. For everyone else, self-evaluations are optional *unless* required by an individual's manager/supervisor.

Q. Is there a separate self-evaluation form?

A. No. All employees subject to the PEP process will receive an email notification when they can access the self-evaluation in the system. It is an optional step, so if you are not required to do one, it's ok to simply skip that part of the process.

Q. How do I get in to the system?

A. You'll get a direct link in the email you receive from the system, but if you need to access the system otherwise, your first step is logging in to UNMJobs (click **here** for help with this).

Q. If I check 'Not Successful' for one or more areas in the Evaluation of Job Responsibilities sections, does that mean that the individual's overall rating must also be 'Not Successful'?

A. No. There are legitimate reasons to choose 'Not Successful'. The individual may be relatively new to the role and haven't yet had an opportunity to demonstrate their performance in a particular area. They may have struggled in an area for the majority of the year, but after coaching conversations, have recently experienced significant improvement. Note that any 'Not Successful' rating(s) must be explained in the comments area before the Evaluation of Goals section.

No employee should be surprised by a 'Not Successful' rating in their evaluation! Conversations about progress and performance should occur throughout the year.

Q. What's the difference between a goal and a task?

A. Goals are general and high-level; *tasks support the goals*. For example, these items may be listed as individual goals: display professional phone etiquette, resolve problems quickly, meet deadlines, follow department SOPs, etc. However, these tasks together actually support a goal of 'improving customer experience' and are what gives you the ability to measure your progress toward the goal.

If you have a large number of goals, you're probably working with a combination of goals and tasks. Consider grouping them as in the example above, and use the employee-manager discussion to reflect on how the employee's task performance supported achievement of his or her goals. This is also very helpful to keep in mind as you plan goals for the upcoming year.

Click **here** for more information on setting goals.

Q. How do I know which rating in the Evaluation of Goals section is appropriate?

A. Reserve **Exceptional** for cases where an individual performed far above agreed expectations and added significantly increased value to the team, department and/or university.
Successful is used in instances where an individual successfully accomplished a project or goal based on the expectations agreed on with the manager. It means that the individual did a thorough, effective job meeting expectations.
Not Successful is used when the project/goal attainment was not achieved (e.g., was incomplete, turned in after the deadline, required significant last-minute rework, contained errors, etc.)

Deferred is used when action on an already established goal is still expected, but funding or priorities have *temporarily* put it on hiatus.
In Progress is used when activity toward the project/goal didn't begin until late in the year and insufficient action has occurred to make a fair evaluation of progress.

Q. What is the difference between comments in the Evaluation of Job Responsibility/Evaluation of Goals areas and the Acknowledgements area?

A. Specific comments describing performance should be included in the Evaluation of Job Responsibility and/or Evaluation of Goals section(s). The employee and supervisor fields in the Acknowledgement area are for recording comments from either party at the conclusion of the performance conversation.

Q. How do I use the Future Goal Planning section?

A. This section is used to discuss and agree upon the upcoming year's goals, based on department needs and priorities, 'stretch' assignments, and development opportunities. This conversation ensures both the employee and manager clearly agree on expectations and the measures that will be used to gauge success.

Q. Who do I contact with questions?

A. For process questions, contact your manager, your HR Services Consultant, or Employee and Organizational Development (EOD). For system or technical issues, please contact HRIT.

Q. What resources are available to help me with the system?

A. You can find more information **here**. You may also contact Employee and Organizational Development if your department is interested in holding an informational session covering the Performance Evaluation Process.