The Performance Evaluation Process

Employee Guide

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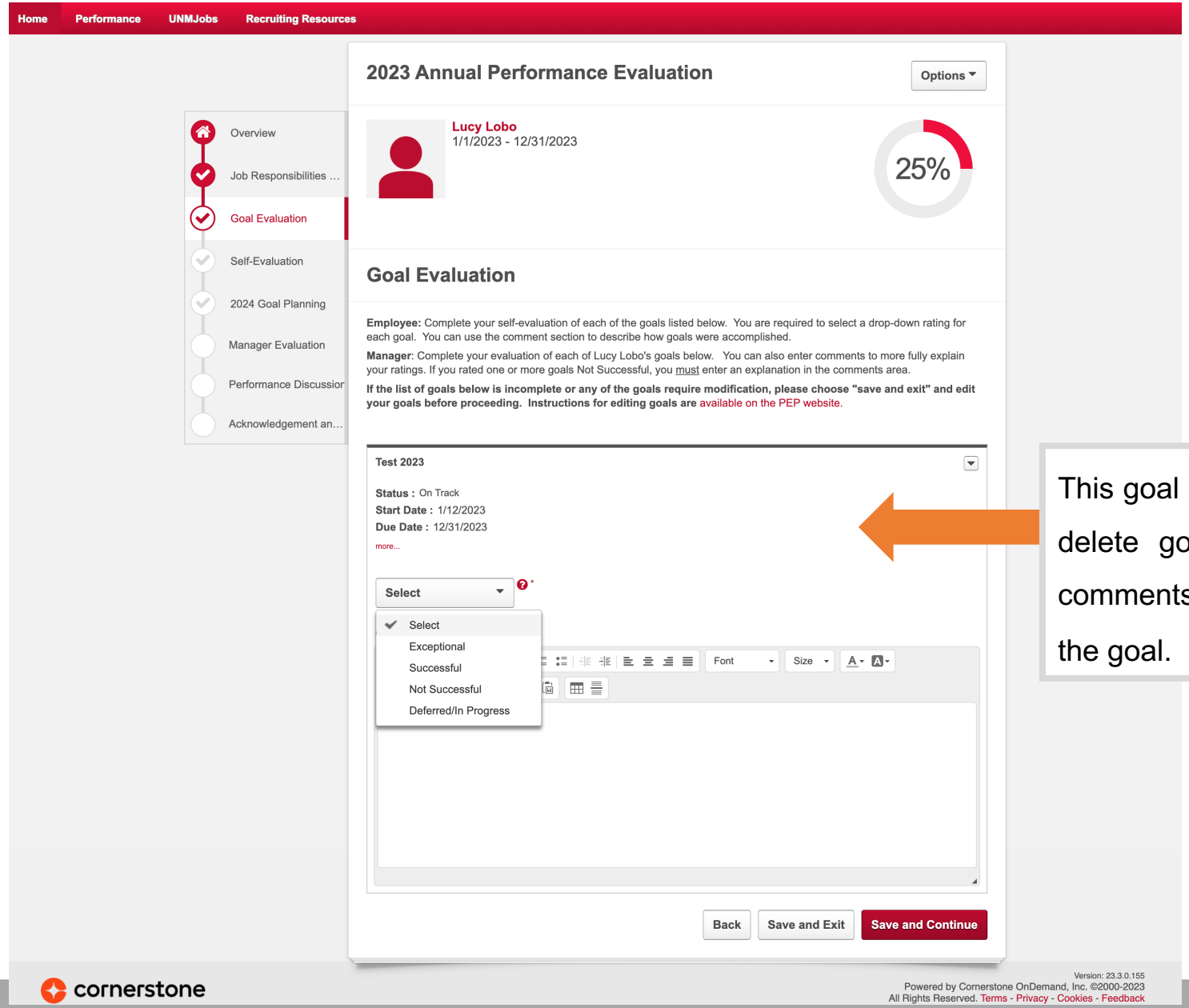
Things you can do to get ready

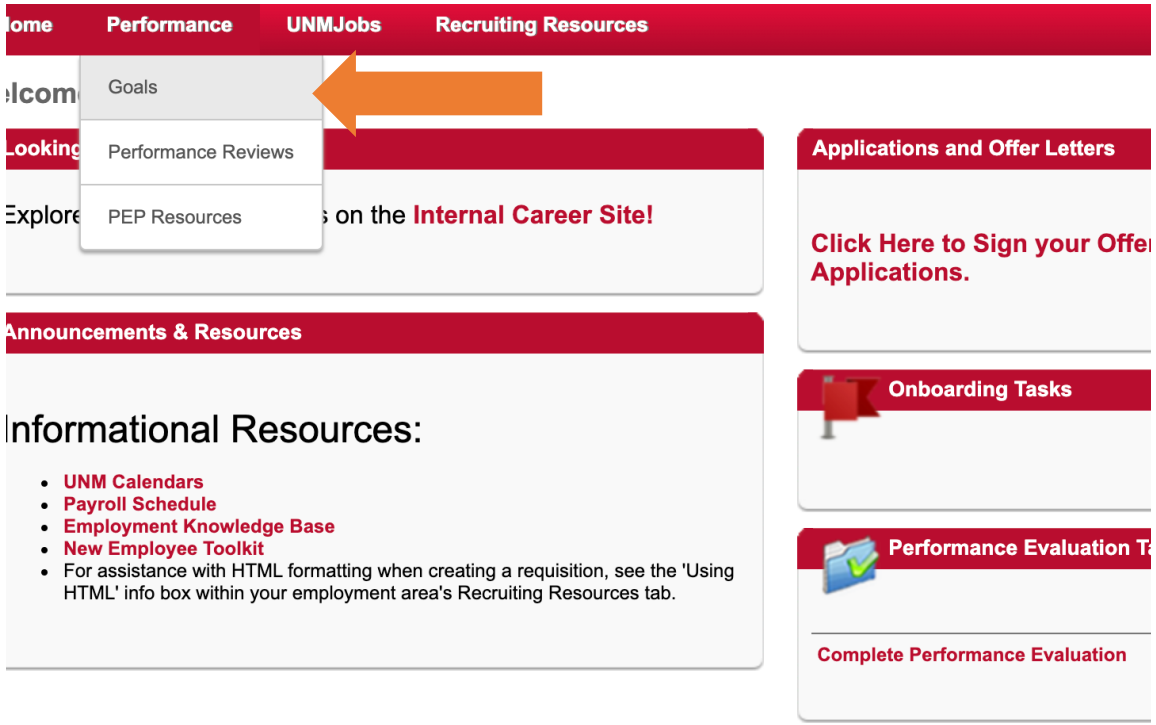
- Make sure your goals are correct here:
  - Sometimes our goals have changed throughout the year and we are unable to complete them.
  - You can add comments and edit goals throughout the year.
  - You should be discussing the progress of goals throughout the year during one-on-ones.
- You want to make sure you are evaluating the most accurate goals.
- It's best to edit a goal rather than cancel because the cancelled goals will still show up in the PEP.

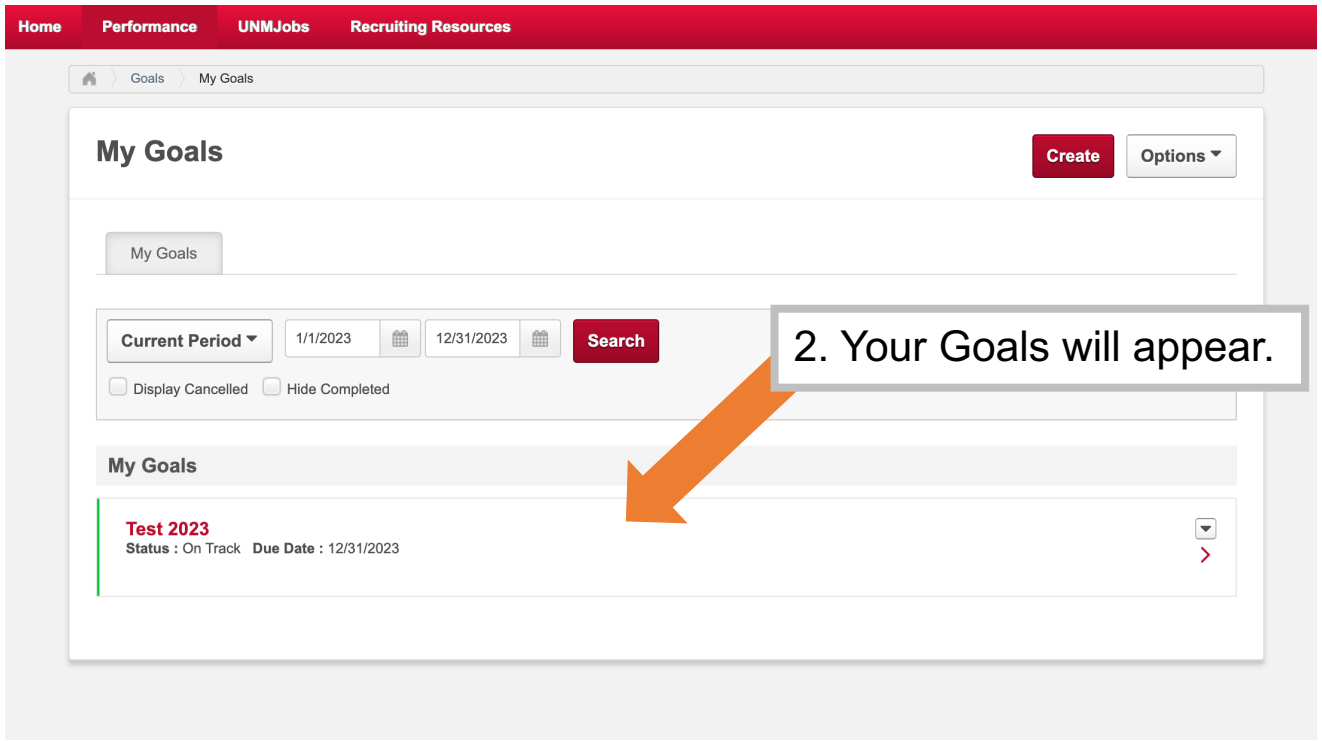
Updating Goals Before the Self-Evaluation



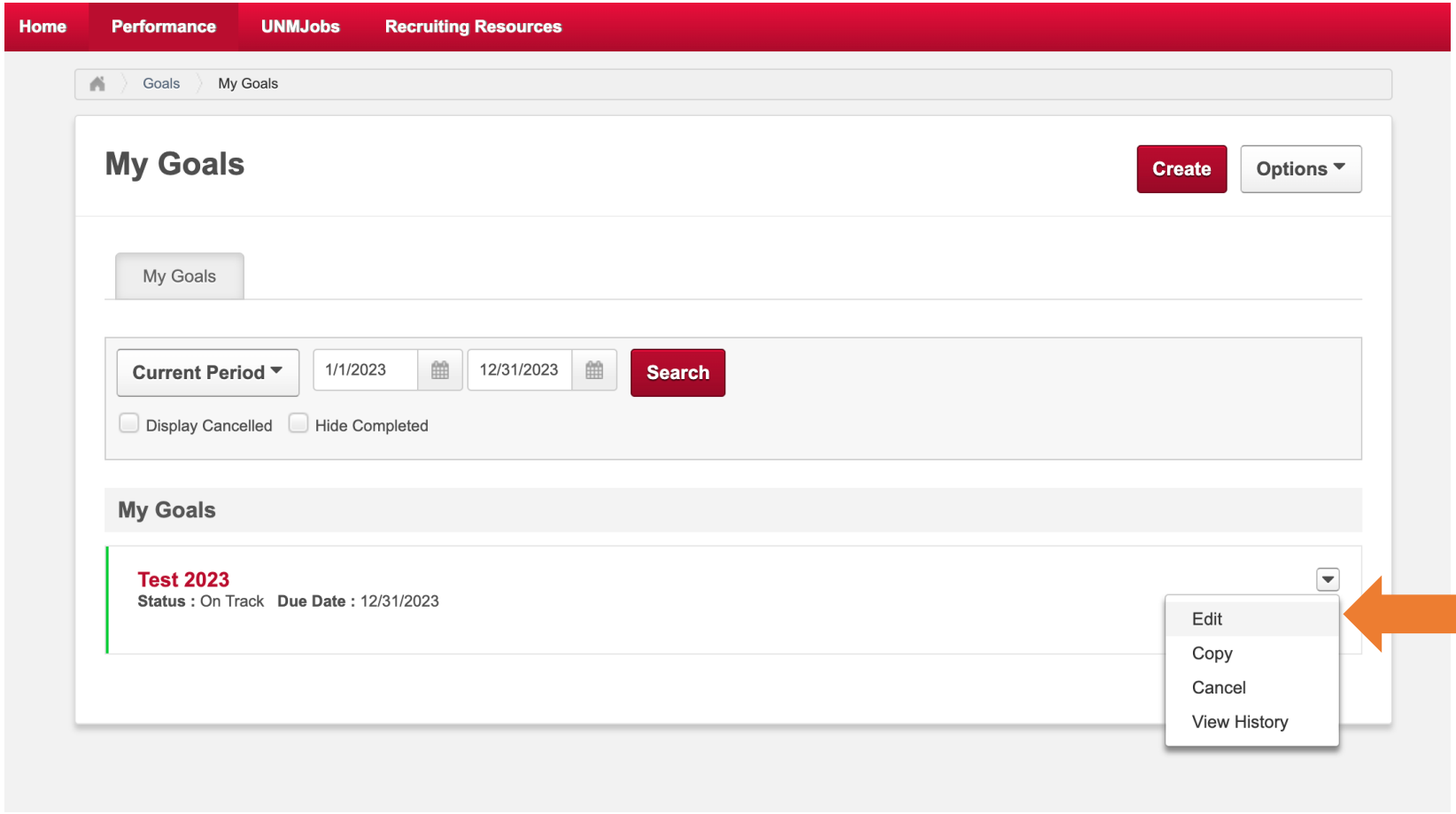
This goal is no longer applicable. I cannot delete goals, so I need to add some comments to explain why I am cancelling the goal.

1. Click on Performance->Goals

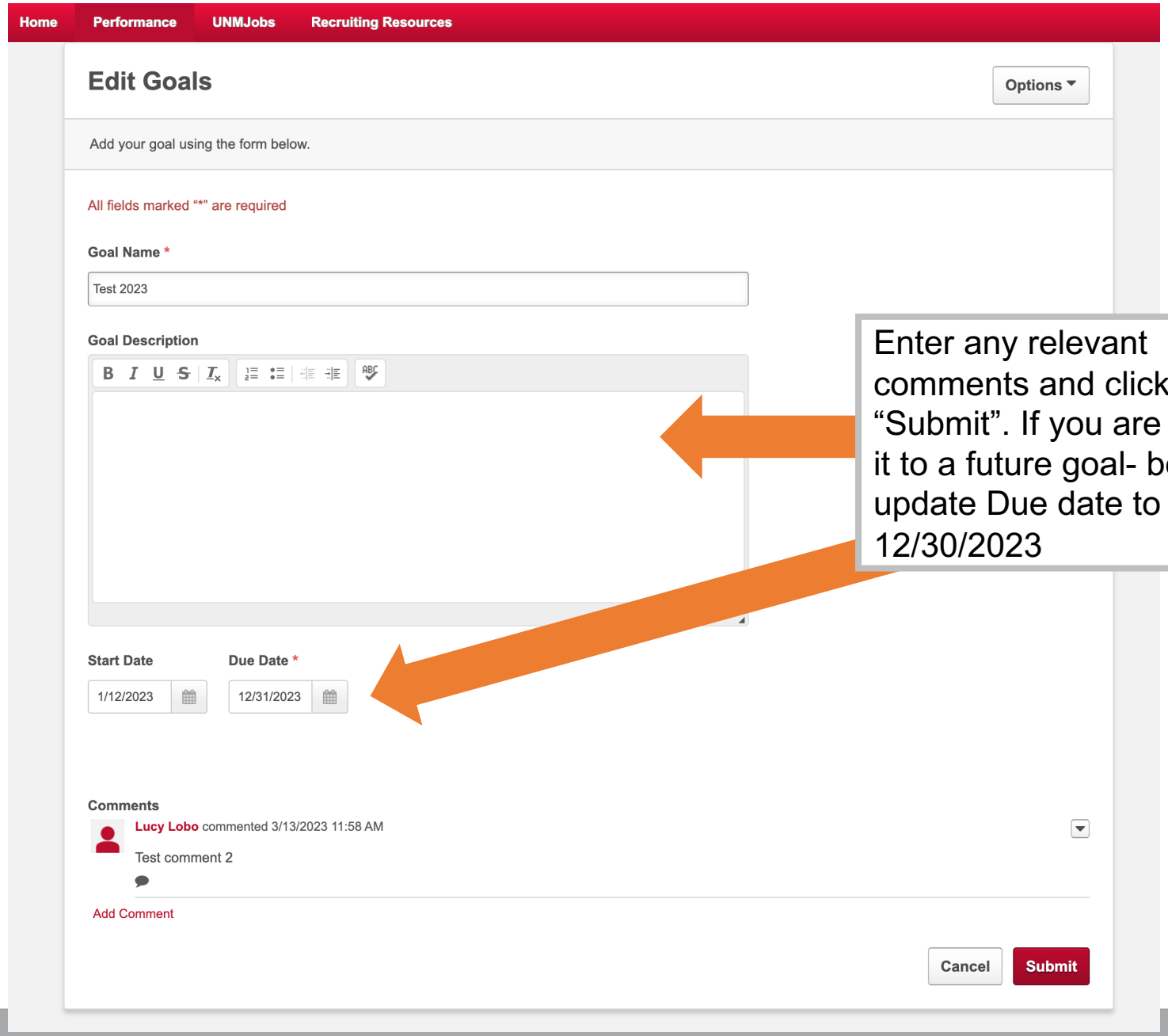




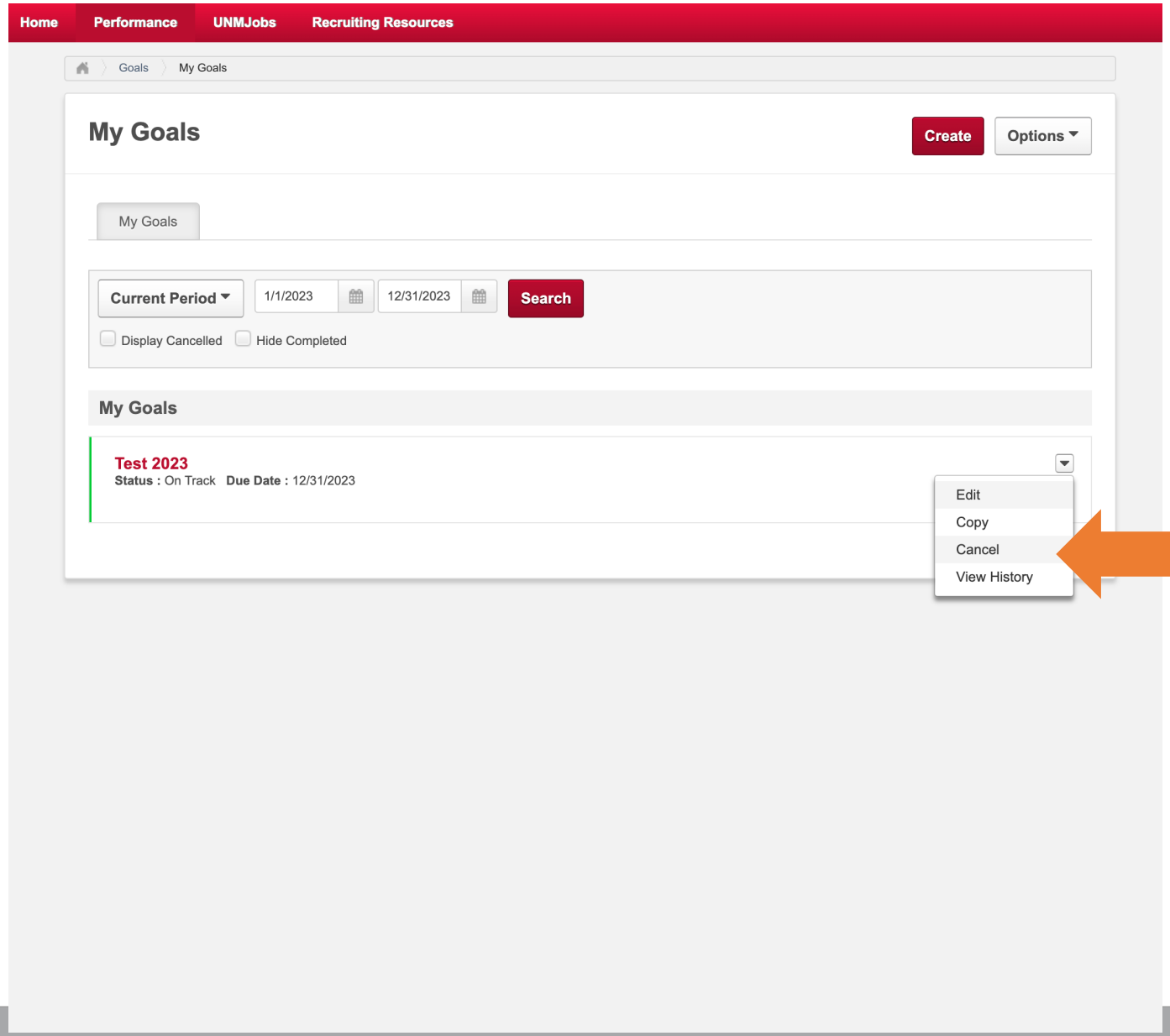
2. Your Goals will appear.



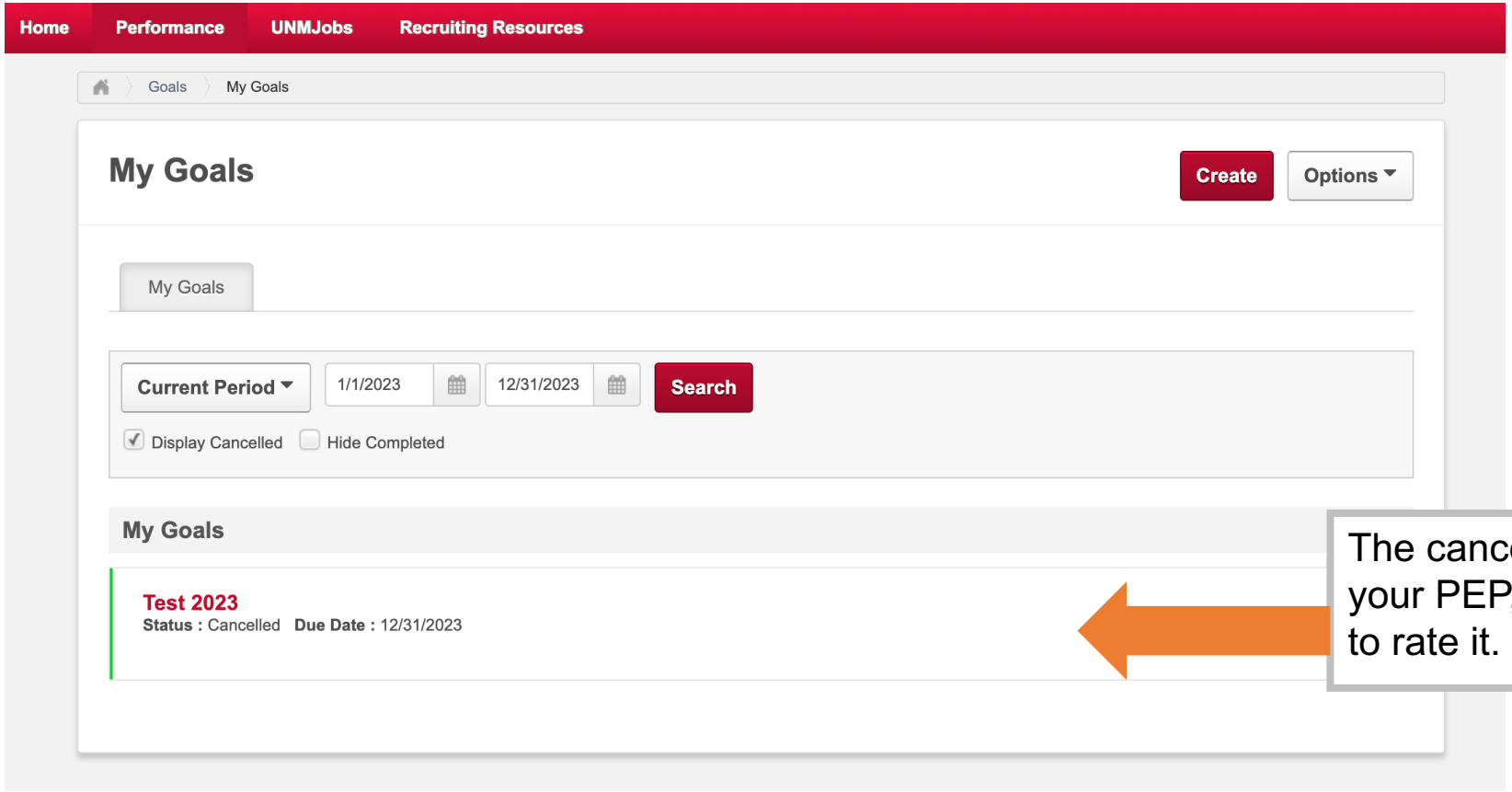
Click the dropdown and “Edit”.



Enter any relevant comments and click "Submit". If you are deferring it to a future goal- be sure to update Due date to 12/30/2023



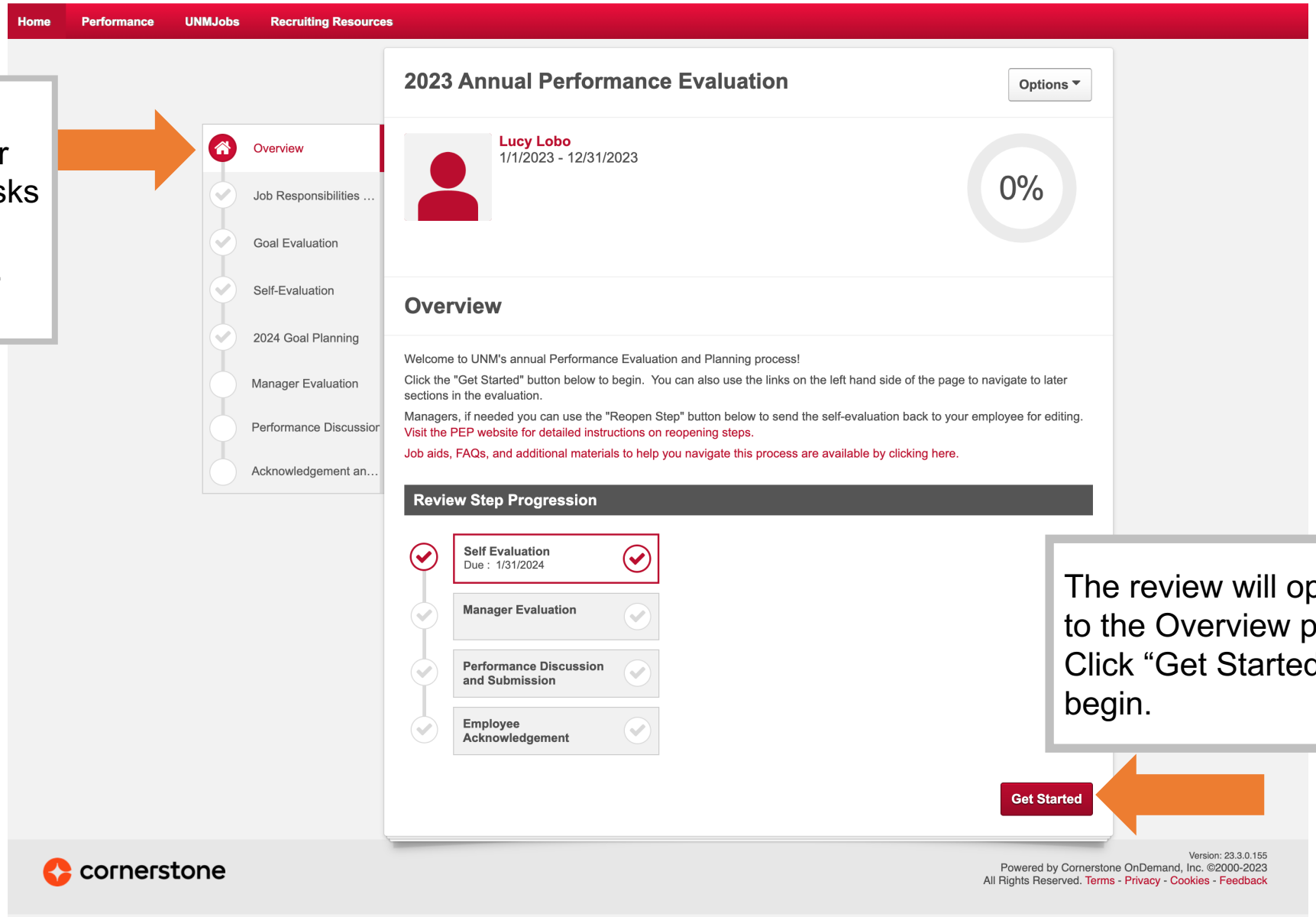
In some cases, it might make more sense to cancel a goal.
To do this- click the dropdown and choose “Cancel”.



The cancelled goal will still appear on your PEP, but you will not be required to rate it.

The Self-Evaluation

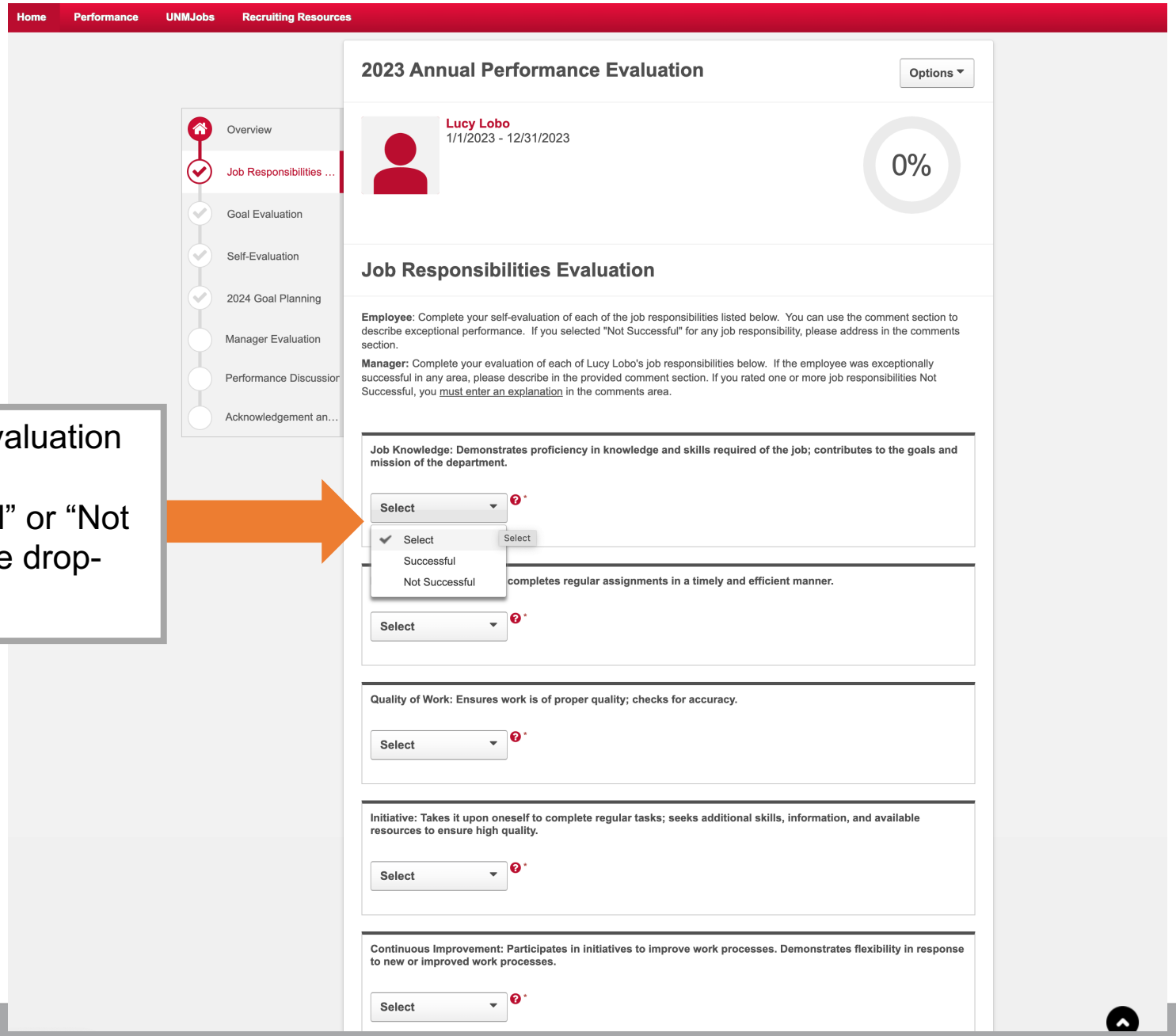
Left sidebar shows the tasks you have completed.

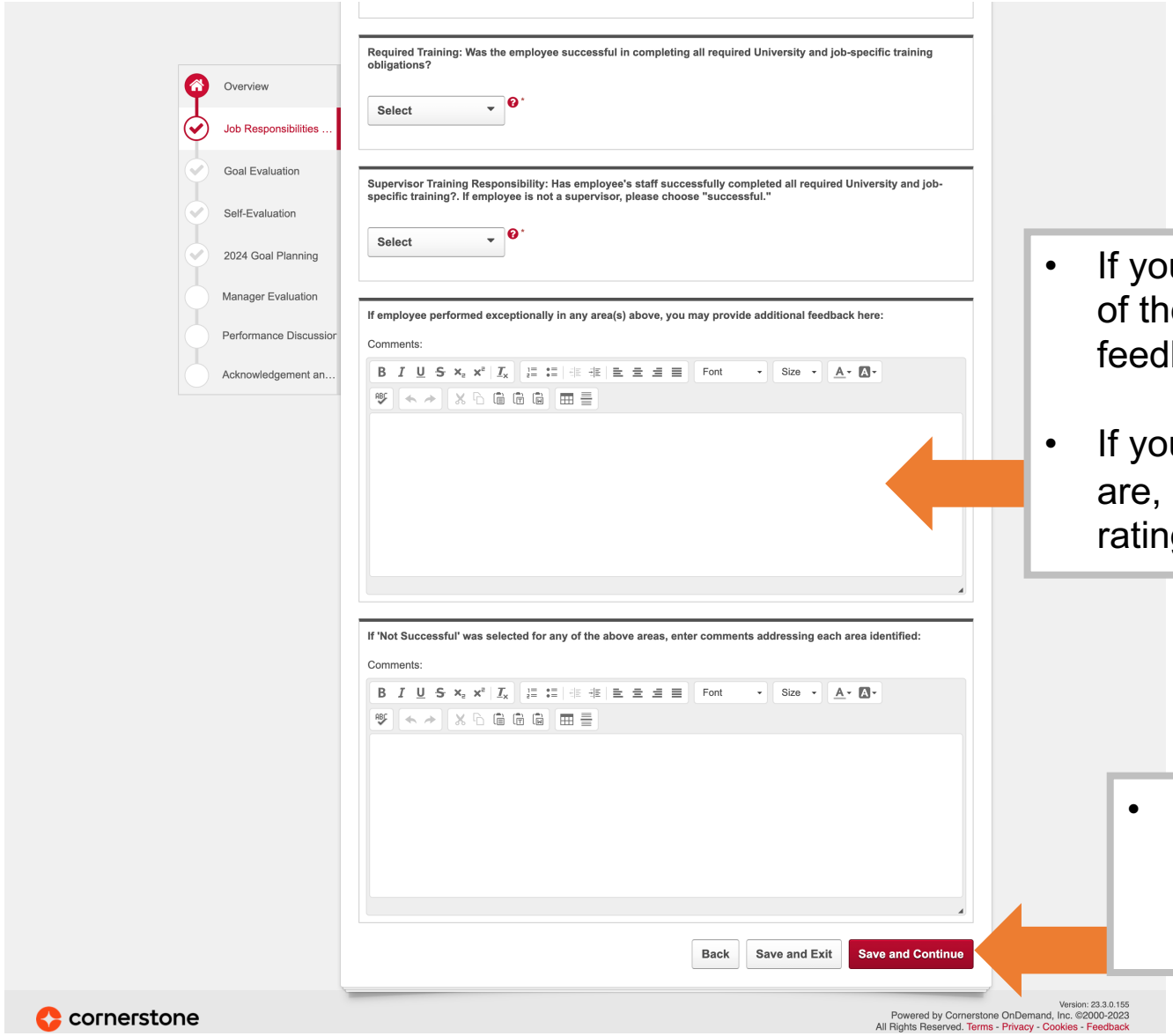


The review will open to the Overview page. Click “Get Started” to begin.

Job Responsibilities Evaluation

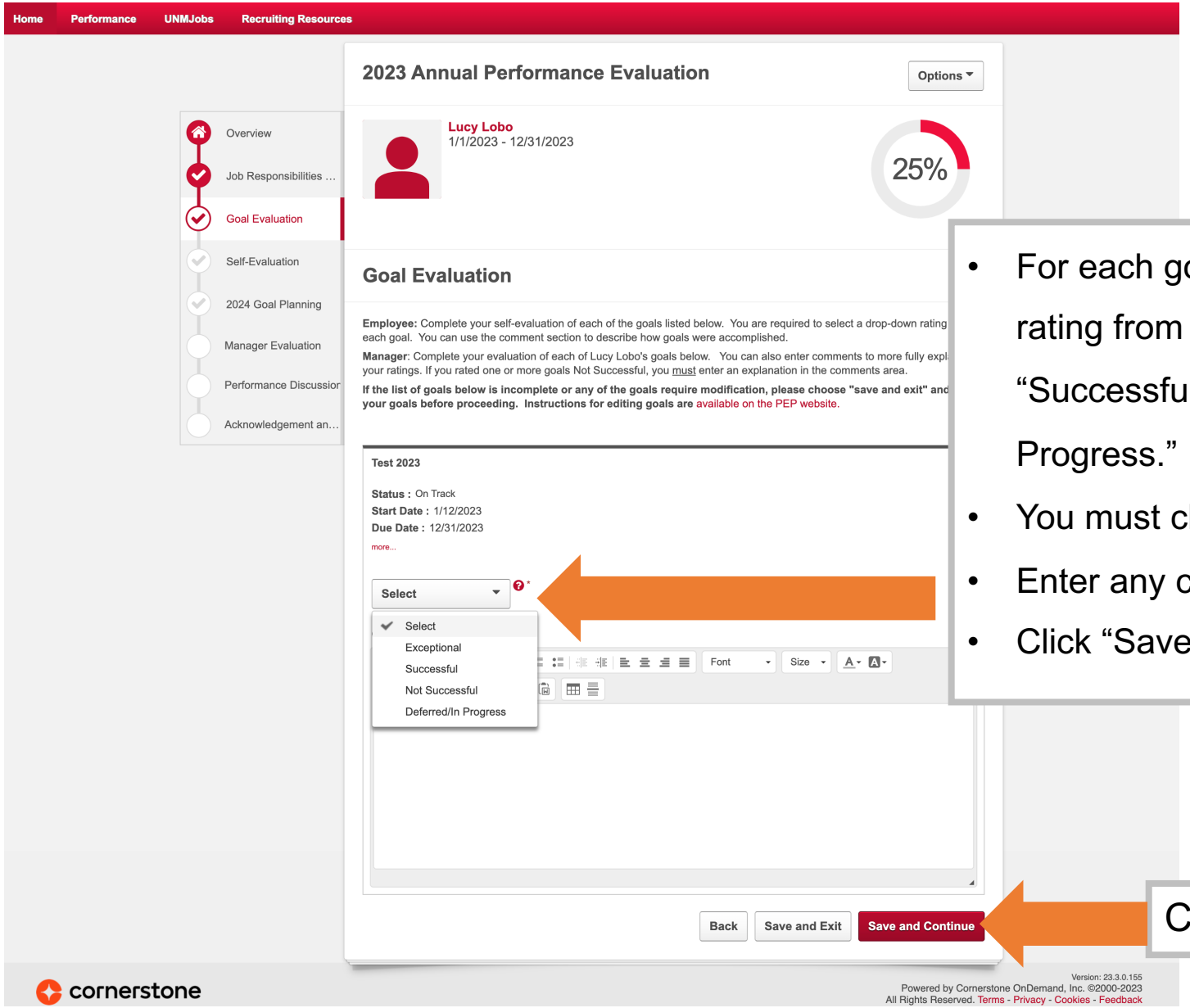
- Choose “Successful” or “Not Successful” from the drop-down menu.





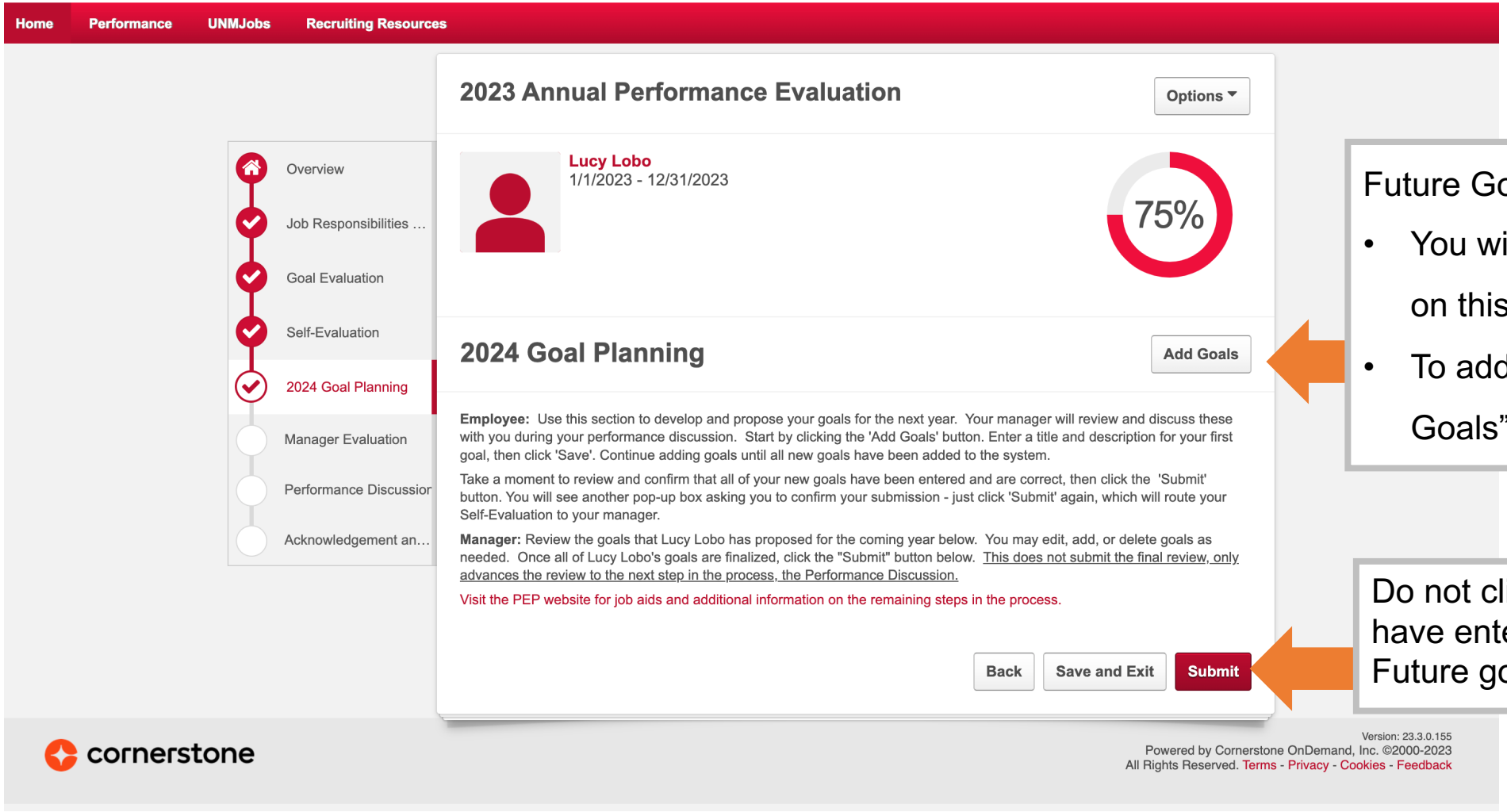
- If you feel you performed exceptionally in any of the areas- you can enter some additional feedback.
- If you gave yourself “Not Successful” for any are, be sure to enter feedback to justify the rating.

- Click “Save and Continue” to move onto the next section.



- For each goal choose the appropriate rating from the dropdown- “Exceptional” “Successful” “Not Successful” “Deferred in Progress.”
- You must choose a rating for each goal
- Enter any comments if necessary
- Click “Save and Continue”.

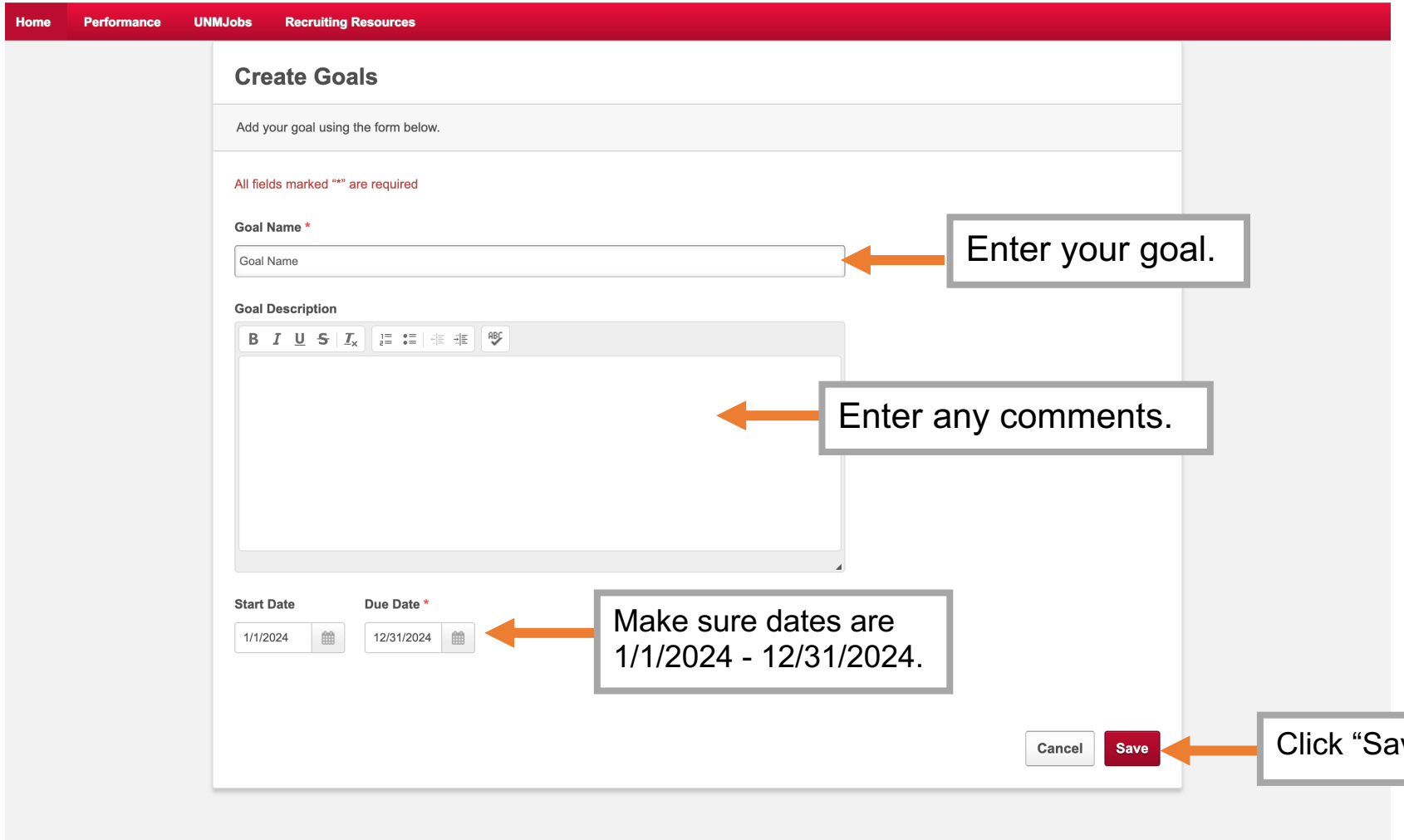
Click “Save and Continue”.

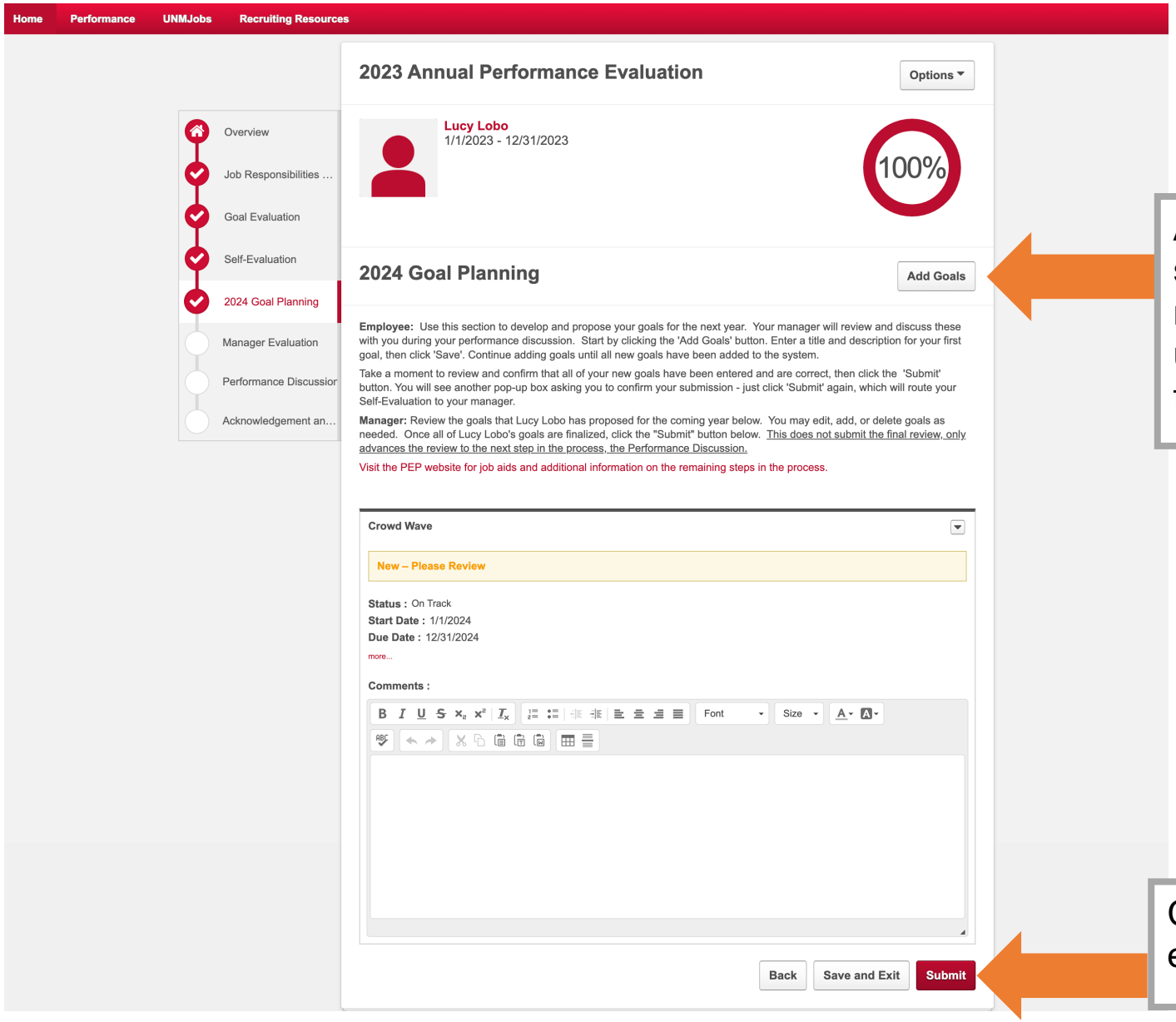


Future Goal Planning

- You will enter your future goals on this page.
- To add goals- click on “Add Goals”.

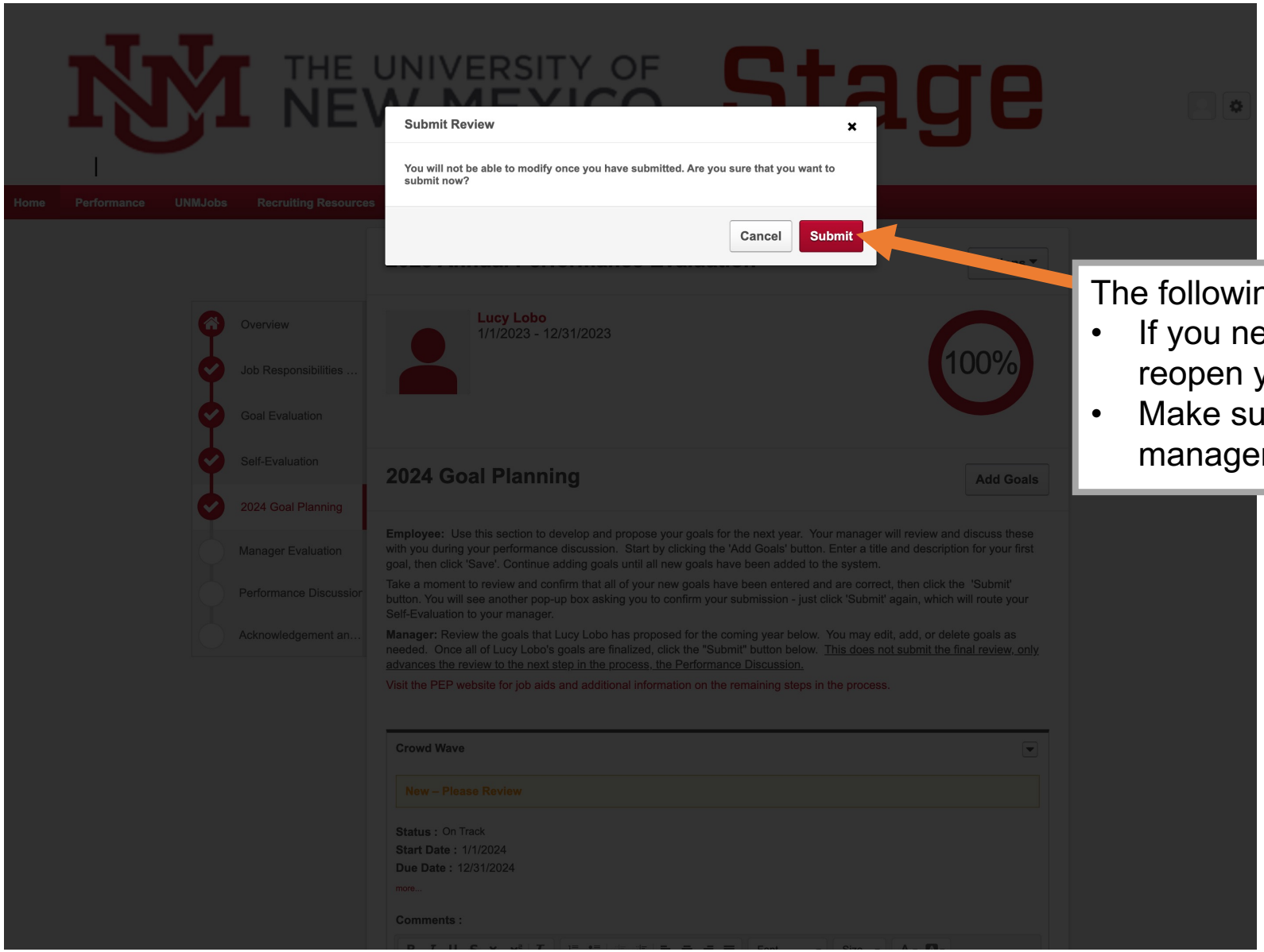
Do not click “Submit” until you have entered ALL of your Future goals.


Home
Performance
UNMJobs
Recruiting Resources
Create Goals
Add your goal using the form below.
All fields marked "*" are required
Goal Name *
Goal Name
Enter your goal.
Goal Description
Enter any comments.
Start Date
1/1/2024
Due Date *
12/31/2024
Make sure dates are 1/1/2024 - 12/31/2024.
Cancel
Save
Click "Save".



After you “Save” your goal – make sure you click “Add Goals” to enter more goals. Don’t click on “Submit” until you have entered in ALL your future goals.

Click “Submit” once you have entered in ALL your future goals.



The following screen will appear.

- If you need to enter more goals, we can reopen your review.
- Make sure you click “Submit” or your manager will not receive your review.

Performance Discussion Step

Guidelines for the Performance Discussion

- Now that the performance evaluation has been submitted, the next step, the Performance Discussion is scheduled.
- Make sure your manager has printed a copy of the review before the discussion so the two of you can address any concerns, add comments, goals or change ratings.
- The Performance Discussion is a meaningful conversation between the manager and employee that will encourage growth and learning.
- It makes mutual expectations clear and sets goals for both parties.
- It maintains open lines of communication.

The Performance Discussion

- Use this time to address any concerns you have.
- Speak positively.
- Listen.
- Ask questions about the feedback you are receiving if you need clarification.
- Address any areas you need support in to accomplish your goals.

Things to think about before the discussion

- What could you be doing differently?
- What new skills and knowledge do you need to become more of an asset?
- What goals does your manager have for you?
- How can you be more helpful to your team?
- What challenges does your manager predict over the next year?

Guide to SMART Goals

- ✓Specific
- ✓Measurable
- ✓Achievable
- ✓Results-Focused
- ✓Time Bound

- Specific- your goal should be clear and specific.

- It's important to have measurable goals, so that you can track your progress and stay motivated. Assessing progress helps you to stay focused, meet your deadlines.

- Your goal also needs to be realistic and attainable to be successful. In other words, it should stretch your abilities but still remain possible. When you set an achievable goal, you may be able to identify previously overlooked opportunities or resources that can bring you closer to it..

- Your goals need to measure actual outputs or results, not activities. These results could include: products, deliverables and accomplishments.

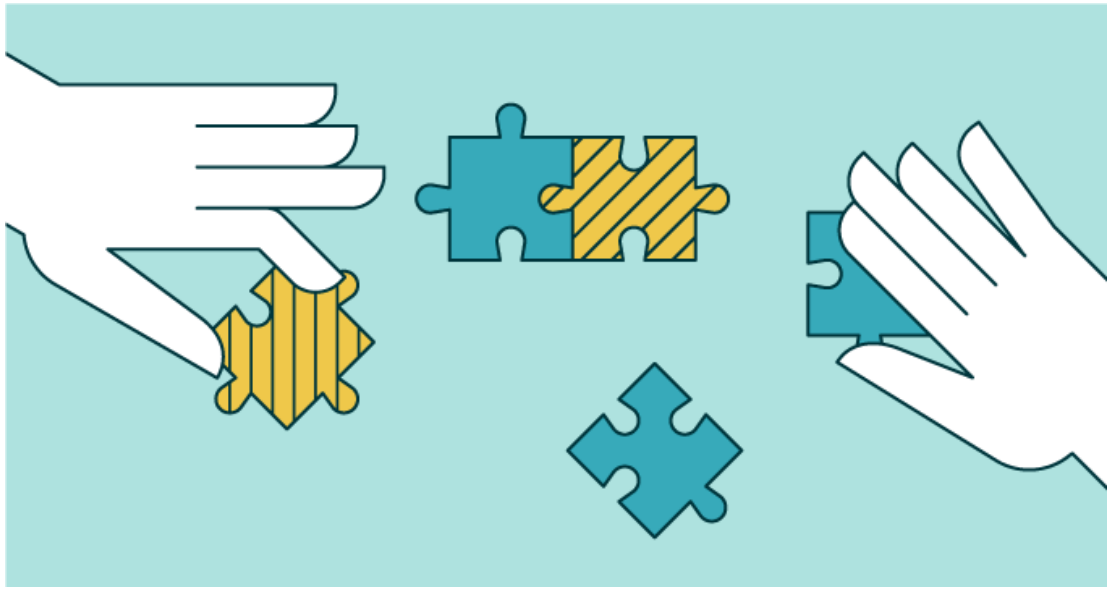
- Every goal needs a target date, so that you have a deadline to focus on and something to work toward. This part of the SMART goal criteria helps to prevent everyday tasks from taking priority over your longer-term goals.

Two Types of Feedback

- Reinforcing
  - Highlights behaviors
  - Builds confidence
  - Inspires team members
  - Creates a culture of respect
- Redirecting
  - Raises awareness
  - Highlights impact
  - Clarifies expected behaviors
  - Communicates belief

What is Effective Feedback?

- Spirit of improvement
- Moves an individual or team forward
- Non judgmental
- Continuous and in the moment
- Honest and conversational
- Inquisitive
- Specific
- Descriptive not critical
- Mainly focused on building strengths



Seeking Feedback Guidelines

- Declare your intent
  - Let the other person know why you want feedback. Your intent is typically to learn, develop, and get better as a leader.
- Ask for specific feedback
  - Avoid asking questions that won't generate useful information. Generic question like "How am I doing?" won't give you any specific insight. Instead, try the following:
    - I've been working on _____. How could I get better?
    - What, specifically, do we need to do better with respect to _____(system/structure/process)?

Seeking Feedback Guidelines

- Listen empathically.
  - Listen to understand, not to explain or defend yourself.
- Acknowledge the feedback.
  - “Thanks for the feedback. Let me think about how I can apply it.”
  - “I am grateful for your specific observations. They are very helfgul. This is what I plan to do.”
- Evaluate the feedback.
  - Use good judgement to determine what to do with the feedback.
- Commit to action.
  - Make commitments carefully and keep them at all costs. Say what you are going to do and then do it.

Feedback Cautions

- Don’t use generic language
  - Vague or extreme statements may sound insincere.
- Don’t make assumptions
  - Feedback that’s based on wrong assumptions is not valid. Ensure you have the facts about a situation to give accurate feedback.

Signing and Acknowledgement

- You will get the link to complete you evaluation once your manager has signed and acknowledged it.
- Click on the link and you can click through to the sign and acknowledge page.
- Once you sign and acknowledge the process is complete.

What if I don’t agree with my PEP?

- If you refuse to sign your review remember:
  - Signing is not agreement- **it is just acknowledging you were given the opportunity.**
- If you still do not want to sign- discuss this with your HR Consultant.

Trouble Shooting

Common Issues

- My manager did not receive my evaluation and I submitted it-
  - Have your manager verify they are listed as the “Manager” in UNM Jobs.
  - Are you sure you submitted it? Double check that the task is gone from your UNM Jobs tasks and that you clicked “Submit”.
- I accidentally clicked submit and I had more 2022 goals to enter
  - Have your manager or contact PEP to have your evaluation reopened and you can go back in and add more goals.

Contact:

Email: pep@unm.edu

Web: unmjobs.unm.edu