Introduction to Performance Management at UTSA

Course Code SD 640
Resources – Go to Performance Management Website

People Excellence created a website dedicated to UTSA Performance Management

Check out Training resources under ‘Performance Management Training’ tab including 3 video recordings

www.utsa.edu/hr/performance-management
What is performance management?

What are we talking about?

Other similar terms:
- Performance Review
- Annual Review
- Annual Appraisal
- Performance Evaluation
Previous performance process at UTSA

• Primarily a paper based manual process
• February 1 through January 31
• The process varied across departments
• Focus on evaluating tasks and essential job functions
• Attributes section (Teamwork, adaptability, motivation, etc.)
• Not utilized for goal setting or development
• Rating scale
  • O = Outstanding
  • SP = Solid Performance
  • I = Improvement Needed
New performance management at UTSA

• New performance management initiated September 1, 2020
• Performance year is September 1 through August 31
• Goals, Core Values and Competencies
• New rating scale
• New platform (ePerformance in PeopleSoft)
Introduction to Performance Management at UTSA

What we’ll cover in class today:

• Performance Management
• Features of UTSA’s new Performance Management Process
• The ePerformance platform in PeopleSoft
• SMART Goals
Why is it important to have an effective performance management process?

• Communication, communication, communication
• Evaluate and set goals
• Clarify expectations
• Individuals can learn, advance, develop skills and abilities
• Ensure we are all contributing to the strategic success of the university
• Knowing if there is room to grow and move up
• The process assists in the decision-making for monetary rewards and promotions
Introduction to Performance Management at UTSA

REMINDER - What we’ll cover in class today:

• Big picture view of the new process – the what, why, who, where, when
• The ePerformance platform in PeopleSoft
• Developing SMART Goals
Let’s take a look at the new aspects to performance management

5 ‘W’s of the new performance management at UTSA

• What  What is the process?
• Why   Why are we changing?
• Who   Who is involved?
• Where Where will the new process be housed?
• When  When are the important timelines and deadlines?
The ‘What’

• Managing performance for UTSA
• A helpful tool to use throughout the year
• For employees, managers and HR administrators
• Based on Goals, Core Values, Competencies
• Promotes planning, collaboration, communication, assessment, monitoring
• Two purposes:
  1. Performance evaluation
  2. Development evaluation
Performance & Development

Performance evaluation
• Assessment and review of an employee’s past performance
• Ratings
• Monetary Rewards
• Promotions
• Career advancement opportunities

Development evaluation
• As a result of the performance evaluation
• Plans for the future
• Training plans
• Certifications
• Growth, expansion, improvements

The ‘What’ continued
The ‘Why’

- Update, improve, modernize
- ePerformance is offered at no additional charge by UTSystem
- Focus on both evaluation and development
- New improved systems (reports, tracking, upload documents, historical perspective)
- Strategic success for UTSA
### The ‘Who’

<table>
<thead>
<tr>
<th>Who*</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individual Contributors (IC)</td>
<td>Anyone in non-supervisory roles and/or those who only have student direct reports</td>
</tr>
<tr>
<td>People Leaders (PL)</td>
<td>Anyone with direct reports and is in a Senior Director and below title</td>
</tr>
<tr>
<td>Executives (EX)</td>
<td>Individuals with titles of Executive Director, Assistant Dean, AVP, Vice Provost and above</td>
</tr>
</tbody>
</table>

* Does not include Faculty (tenured/tenure-track/non-tenure/adjunct)
The ‘Where’

UTShare/PeopleSoft ePerformance platform

Employee Self Service

[Manager Self Service]
The ‘When’ of the Performance Management process

<table>
<thead>
<tr>
<th>When?</th>
<th>What happens?</th>
<th>Who does it?</th>
</tr>
</thead>
<tbody>
<tr>
<td>September – October timeframe</td>
<td>Define and write GOALS</td>
<td>Employee and Manager together</td>
</tr>
<tr>
<td>Mid- to Late-October (at the latest)</td>
<td>Enter GOALS into ePerformance in PeopleSoft</td>
<td>Employee</td>
</tr>
<tr>
<td>By October 31 (this year only, Nov. 7)</td>
<td>Approve GOALS</td>
<td>Manager</td>
</tr>
<tr>
<td>Throughout the year</td>
<td>Monitor, evaluate, communicate, enter information, upload documents</td>
<td>Both Employee and Manager</td>
</tr>
<tr>
<td>February – March timeframe</td>
<td>Mid-Year Check-in</td>
<td>Both Employee and Manager</td>
</tr>
<tr>
<td>By August 31(^{\text{st}})</td>
<td>Complete a SELF-EVALUATION</td>
<td>Employee</td>
</tr>
<tr>
<td>Early September</td>
<td>Complete performance evaluation on the employee</td>
<td>Manager</td>
</tr>
<tr>
<td>Early- to Mid-September</td>
<td>One-on-one meeting to discuss</td>
<td>Employee and Manager together</td>
</tr>
<tr>
<td>Late September</td>
<td>Acknowledge receipt of the evaluation; employee may include comments</td>
<td>Employee</td>
</tr>
<tr>
<td>September 30(^{\text{th}}) deadline</td>
<td>Complete performance evaluation</td>
<td>Manager with Next Level Manager</td>
</tr>
</tbody>
</table>
Re-Cap of the 5 ‘W’s of UTSA’s new performance management

• What?  New process, New criteria, New online platform
• Why?  To improve, modernize, use as a tool
• Who?  All of us will participate
• Where?  PeopleSoft ePerformance Platform
• When?  September 1 to August 31, various steps along the way

What questions do you have?
Four new aspects to UTSA’s Performance Management

#1. Goals

#2. Core Values

#3. Competencies

#4. New rating scale
#1. Goals

- All employees will develop goals at the beginning of the performance year.
- Goals will be based on the SMART model: Specific, Measurable, Attainable, Relevant, Time-based.
- Goals will be entered into the ePerformance platform in PeopleSoft.
- Some more strategic, some more task oriented.
- The rating will be ‘Goal Achieved’ or ‘Goal Not Achieved’.

*In this training we’ll cover SMART goals in detail.*
#2. Core Values

UTSA’s Core Values are the foundation of all that we do. They guide UTSA to be a model for student success, to be a great public research university and an exemplar for strategic growth and innovative excellence. As part of the new performance process, employees will be rated on their ability to practice and promote UTSA’s core values.

Core Values – *What are UTSA’s Core Values? (hint: there are 6 of them)*

- Integrity
- Excellence
- Inclusiveness
- Respect
- Collaboration
- Innovation
#3. Competency-based model

Demonstrable characteristics and skills that enable people to deliver superior performance in a given job, role, or situation.

A person gains competency through education, training, experience, and natural abilities.
## Competencies by group

<table>
<thead>
<tr>
<th>Individual Contributor</th>
<th>People Leader</th>
<th>Executive</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Customer Focus</td>
<td>1. Decision Quality</td>
<td>1. Organizational Agility</td>
</tr>
</tbody>
</table>
#4. New Rating Scale for Core Values & Competencies

<table>
<thead>
<tr>
<th>Rating</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 – Does Not Meet Expectations</td>
<td>No behavioral indicators listed were met</td>
</tr>
<tr>
<td>2 – Somewhat Meets Expectations</td>
<td>Some of the behavioral indicators listed were met</td>
</tr>
<tr>
<td>3 – Meets Expectations</td>
<td>Most of the behavioral indicators listed were met</td>
</tr>
<tr>
<td>4 – Exceeds Expectations</td>
<td>Most or all of the behavioral indicators listed were met</td>
</tr>
<tr>
<td>5 – Role Model</td>
<td>All of the behavioral indicators listed were met or exceeded</td>
</tr>
</tbody>
</table>
Competency Example (IC and PL) - Description

Dealing with Ambiguity

Can effectively cope with change; can shift gears comfortably; can decide and act without having the total picture; isn’t upset when things are up in the air; doesn’t have to finish things before moving on; can comfortable handle change.
## Rating Scale Example – Dealing with Ambiguity

<table>
<thead>
<tr>
<th>Rating #</th>
<th>Rating Description</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Does Not Meet Expectations</td>
<td>Was resistant to change; rarely sought opportunities to provide a different perspective; had difficulty making decisions or executing without the full picture</td>
</tr>
<tr>
<td>2</td>
<td>Somewhat Meets Expectations</td>
<td>Was able to maneuver through changing situations and ambiguity with guidance and supervision; sometimes required additional information to move forward</td>
</tr>
<tr>
<td>3</td>
<td>Meets Expectation</td>
<td>Was comfortable with change and was able to adapt to changing situations; was able to perform tasks in an ambiguous environment with some supervision and guidance</td>
</tr>
<tr>
<td>4</td>
<td>Exceeds Expectations</td>
<td>Was comfortable with change and exhibited adaptability in both changing and ambiguous environments; required little to no guidance to move forward</td>
</tr>
<tr>
<td>5</td>
<td>Role Model</td>
<td>Embraced change and influenced others in the change process; acted as a change agent in the organization; flawlessly executed in an ambiguous environment with little to no guidance</td>
</tr>
</tbody>
</table>
Notes on the new rating scale

• A manager using either a rating of 1 or 5 is required to provide justification for these ratings

• The PeopleSoft ePerformance platform allows both employees and managers to upload attachments as examples

• Employees and managers are able to add comments to each rating

• Employees have the opportunity at the end of the process to comment, especially if they disagree with any of the manager’s ratings
Introduction to ePerformance In PeopleSoft
ePerformance in PeopleSoft

• Enter your goals at the start of the performance year
• Complete your self-evaluation at the end of the performance year
• Use ePerformance as a tool throughout the year

• This presentation will cover:
  ➢ How to login to ePerformance in PeopleSoft
  ➢ How to enter Goals
  ➢ How to access the Self-Evaluation portal
Accessing ePerformance in PeopleSoft

https://my.utshare.utsystem.edu
Login to
my.utsharе.utsystem.edu

myUTSA ID
xlq889

Password
....................

Login

Forgot your password?
Need Help?
Acceptable Use Policy

For security reasons, please exit your Web browser and/or log out completely when you are done accessing services that require authentication, especially if you are using a public computer or kiosk.

This is a logon server for multiple web services, please do not bookmark this page.

This computer application is the property of The University of Texas at San Antonio. Improper or unauthorized use of this application may lead to criminal prosecution or other disciplinary action. Use of this application, authorized or unauthorized, constitutes consent to monitoring of the system and the user’s acknowledgement of accountability and responsibility.
UTShare/PeopleSoft

ePerformance

platform

Employee Self Service

Next Due Date: 10/31/2020
### Steps to enter goals

#### My Current Documents

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Document Status</th>
<th>Period Begin / Period End</th>
<th>Next Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>UTSA Performance Evaluation</td>
<td>Define Criteria</td>
<td>09/01/2020</td>
<td>10/31/2020</td>
</tr>
<tr>
<td></td>
<td></td>
<td>08/31/2021</td>
<td></td>
</tr>
</tbody>
</table>
Steps to enter goals

1. Add the performance criteria (goals and/or responsibilities) that you plan to accomplish during the performance period.
2. Once you have completed this step select the notify button to email your manager.
Steps to enter goals
For more training materials on SMART goals: [www.utsa.edu/hr/performancemanagement](http://www.utsa.edu/hr/performancemanagement)
SMART goals
- Specific
- Measurable
- Achievable
- Relevant
- Time-based

Go to www.utsa.edu/hr/performance-management for more training materials about SMART goals
Steps to enter goals

Performance Process

Define Criteria - Update
Employee Name

Job Title: TRAINER & INSTRUCTIONAL DESIGN
Document Type: UTSA Performance Evaluation
Template: Individual Contributor: FY2021
Status: In Progress
Manager Name

1. Add the performance criteria (goals and/or responsibilities) that you plan to accomplish during the performance period.
2. Once you have completed this step select the notify button to email your manager.

Section 1 - Goals

Articulate Storyline Online Learning Module

Description: Learn Articulate Storyline software in order to develop online learning and create from scratch at least one new online learning module for UTSA employees by the end of August 2021.

Measurement: The creation of one new online learning module, effective and well received by UTSA employees
Steps to enter goals

Performance Process

Steps and Tasks

Employee Name

UTSA Performance Evaluation
09/01/2020 - 08/31/2021

Overview

Goal Setting
Due Date: 09/30/2020

Complete Self Evaluation
Due Date: 09/14/2021

Review Manager Evaluation
Due Date: 10/15/2021

Please enter your email message and select the send button.

To: Your Manager's email will auto-fill here

Subject: This is a notification regarding the UTSA Performance Evaluation for

Message Text:

254 characters remaining

Send  Cancel
**Self-Evaluation Portal**

<table>
<thead>
<tr>
<th>Performance Process</th>
<th>UTSA Performance Evaluation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Steps and Tasks</td>
<td></td>
</tr>
<tr>
<td>Employee Name</td>
<td></td>
</tr>
<tr>
<td>Manager Name</td>
<td></td>
</tr>
</tbody>
</table>

**Self-Evaluation - Update and Complete**

- **Employee Name**
- **Manager Name**

- **Job Title**: TRAINER & INSTRUCTIONAL DESIGN
- **Document Type**: UTSA Performance Evaluation
- **Template**: Individual Contributor FY2021
- **Status**: Evaluation in Progress
- **Period**: 08/01/2020 - 08/31/2021
- **Document ID**: 10258
- **Due Date**: 09/14/2021

Enter your ratings and comments for each applicable section and save. When you have finished updating your evaluation, select the **Complete** button to save your changes and send this document to your manager for review.

- **Goals**
- **Core Values**
- **Operation Excellence**
- **Personal Growth**
- **Summary**

**Section 1 - Goals**

Provide the final status of the goal and any applicable comments.

- Expand | Collapse

**Articulate Storyline**

**Attachments**

No Attachments have been added to this document.

**Add Attachment**

**Audit History**
### Self-Evaluation Portal

#### UTSA Performance Evaluation

**Self-Evaluation - Update and Complete**

<table>
<thead>
<tr>
<th>Job Title</th>
<th>TRAINER &amp; INSTRUCTIONAL DESIGN</th>
<th>Manager</th>
</tr>
</thead>
</table>

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<thead>
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<th>Document Type</th>
<th>UTSA Performance Evaluation</th>
<th>Period</th>
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<tbody>
<tr>
<td>Template</td>
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<td>Document ID: 10258</td>
</tr>
<tr>
<td>Status</td>
<td>Evaluation in Progress</td>
<td>Due Date: 09/14/2021</td>
</tr>
</tbody>
</table>

Enter your ratings and comments for each applicable section and save. When you have finished updating your evaluation select the Complete button to save your changes and send this document to your manager for review.

#### Section 1 - Goals

Provide the final status of the goal and any applicable comments.

- [Expand](#)  | [Collapse](#)

- **Articulate Storyline**

#### Attachments

No Attachments have been added to this document

- [Add Attachment](#)

#### Audit History
Self-Evaluation - Goals

Articulate Storyline Online Learning Module

Description: Learn Articulate Storyline software in order to develop online learning and create from scratch at least one new online learning module for UTSA employees by the end of August 2021.

Measurement: The creation of one new online learning module, effective and well received by UTSA employees

- Reminder Date: 12/15/2020
- Due Date: 08/31/2021
- Critical: No
- Stretch Goal: No
- Start Date: 09/01/2020
- End Date: 08/31/2021

Employee Rating

Employee Comments

Attachments
No Attachments have been added to this document

Add Attachment
We encourage an environment of dialogue and discovery, where integrity, excellence, inclusiveness, respect, collaboration and innovation are fostered. UTSA's core values reflect how we, as employees, have pursued this plan as well as how we will fulfill our mission and realize our vision.

- Integrity
- Excellence
- Inclusiveness
- Respect
- Collaboration
- Innovation
Self-Evaluation – Core Values

Description: Adhering to a standard of core values at UTSA and ensuring that one acts in a fair and ethical fashion.

Employee Rating: [Rating]

Employee Comments:

Attachments
No Attachments have been added to this document

Add Attachment
<table>
<thead>
<tr>
<th>Proficiencies</th>
<th>Rating</th>
<th>Numeric Rating</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Does Not Meet Expectations</td>
<td>○</td>
<td>1.00</td>
<td>Consistently fails to apply the appropriate laws, regulations, and University policies. Does not practice confidentiality and fails to accurately determine ethical dilemmas and conflicts of interest, resulting in the University assuming an unnecessary risk.</td>
</tr>
<tr>
<td>2. Somewhat Meets Expectations</td>
<td>○</td>
<td>2.00</td>
<td>Inconsistent in application and adherence to the appropriate laws, regulations, and University policies. Does not practice the expected standard of confidentiality. May not accurately determine ethical dilemmas and conflicts of interest, resulting in increased risk for the University.</td>
</tr>
<tr>
<td>3. Meets Expectations</td>
<td>○</td>
<td>3.00</td>
<td>Complies with all appropriate laws, regulations, and University policies in performance of his or her job responsibilities. Practices confidentiality and meets the expected standard of behavior to identify ethical dilemmas and conflicts of interest in effort to mitigate risk.</td>
</tr>
<tr>
<td>4. Exceed Expectations</td>
<td>○</td>
<td>4.00</td>
<td>Maintains confidentiality, stewards University resources with integrity. Works to ensure compliance related to performing his or her job responsibilities. Identifies and addresses ethical dilemmas and conflicts of interest in effort to mitigate risk.</td>
</tr>
<tr>
<td>5. Role Model</td>
<td>○</td>
<td>5.00</td>
<td>Models and leads by example in the stewardship of University resources. Actively works to consider issues of compliance and confidentiality as it relates to the performance of his or her responsibilities and looks to his or her responsibilities and ethics to identify ethical dilemmas and conflicts of interest, taking action to avoid or prevent them.</td>
</tr>
</tbody>
</table>
Self-Evaluation – Operational Excellence

Self-Evaluation - Update and Complete
Enter your ratings and comments for each applicable section and save. When you have finished updating your evaluation, select the Complete button to save your changes and send this document to your manager for review.

Section 3 - Operational Excellence

A philosophy of the workplace where problem-solving and teamwork results in the ongoing improvement in an organization. The process involves focusing on the customers' needs and continually improving the current activities in the workplace.

Customer Focus
Dealing with Ambiguity
Functional/Technical Skills
Action Oriented
Self-Evaluation – Operational Excellence

Section 3 - Operational Excellence

A philosophy of the workplace where problem-solving and teamwork results in the ongoing improvement in an organization. The process involves focusing on the customers’ needs and continually improving the current activities in the workplace.

Customer Focus

Description: Dedicated to meeting the expectations and requirements of internal and external customers; gets first-hand customer information and uses it for improvements in products and services; acts with customers in mind; establishes and maintains effective relationships with customers and gains their trust and respect.

Employee Rating: [Select]

Employee Comments:
## Self-Evaluation – Operational Excellence – Customer Focus

<table>
<thead>
<tr>
<th>Proficiencies</th>
<th>Numeric Rating</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Does Not Meet Expectations</td>
<td>1.00</td>
<td>Rarely placed students/customers needs above own; rarely participated in community/volunteer events.</td>
</tr>
<tr>
<td>2. Somewhat Meets Expectations</td>
<td>2.00</td>
<td>With coaching and encouragement, placed students/customers needs above their own. May have participated in community/volunteer events.</td>
</tr>
<tr>
<td>3. Meets Expectations</td>
<td>3.00</td>
<td>Was able to gain the trust and respect of students/customers; establishes and maintained effective relationships with students/customers.</td>
</tr>
<tr>
<td>4. Exceed Expectations</td>
<td>4.00</td>
<td>Exhibited selfless service; took initiative to celebrate student/customer success, while putting the needs of others above their own; maintained trusting and respectful relationships with students/customers. Volunteered in established community/volunteer events.</td>
</tr>
<tr>
<td>5. Role Model</td>
<td>5.00</td>
<td>The epitome of selfless service; sought insights into the student/customer experience, looked for ways to make improvements and bring forth ideas; developed a reputation of respect and trustworthiness. Sought new ways to contribute and give back to the community.</td>
</tr>
</tbody>
</table>
Self-Evaluation – Personal Growth

Self-Evaluation - Update and Complete

Employee Name

<table>
<thead>
<tr>
<th>Job Title</th>
<th>TRAINER &amp; INSTRUCTIONAL DESIGN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager Name</td>
<td></td>
</tr>
<tr>
<td>Period</td>
<td>09/01/2020 - 08/31/2021</td>
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<td>09/14/2021</td>
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<tr>
<td>Status</td>
<td>Evaluation in Progress</td>
</tr>
</tbody>
</table>

Enter your ratings and comments for each applicable section and save. When you have finished updating your evaluation select the Complete button to save your changes and send this document to your manager for review.

- Goals
- Core Values
- Operation Excellence
- Personal Growth
- Summary

Section 4 - Personal Growth

Personal growth is the ongoing process of understanding and developing oneself in order to achieve one's fullest potential.

Self Development

Description: Is personally committed to and actively works to continuously improve himself/herself; understands that different situations and levels may call for different skills and approaches; works to deploy strengths, works on compensating for weaknesses and limits.

Employee Rating

Employee Comments
<table>
<thead>
<tr>
<th>Proficiencies</th>
<th>Numeric Rating</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Does Not Meet Expectations</td>
<td>1.00</td>
<td>Rarely participated in learning or career development unless required. Was unwilling to work on projects unfamiliar or outside of their comfort zone or regular area of focus. Refused to consider incorporating new skills or knowledge into their work.</td>
</tr>
<tr>
<td>2. Somewhat Meets Expectations</td>
<td>2.00</td>
<td>Participated in formal and on the job learning or career development opportunities if asked. Rarely looked for or took on new tasks to build skills. Had shown resistance to incorporating new skills or knowledge into current work style.</td>
</tr>
<tr>
<td>3. Meets Expectations</td>
<td>3.00</td>
<td>Participated in formal and on the job learning or career development opportunities when asked. Utilized current skills and knowledge to perform job responsibilities. Was receptive to ways in which he or she can incorporate new skills or knowledge learned into their work.</td>
</tr>
<tr>
<td>4. Exceed Expectations</td>
<td>4.00</td>
<td>Actively participated in formal and on the job learning or career development opportunities. Was willing to take on work that builds new skills. Applied new skills or knowledge in daily work.</td>
</tr>
<tr>
<td>5. Role Model</td>
<td>5.00</td>
<td>Proactively identified needs for development and sought out formal and on the job learning or career development opportunities. Volunteered for “stretch” assignments in different or challenging areas to develop new or more proficient skills. Applied new skills or knowledge to practical use in daily work.</td>
</tr>
</tbody>
</table>
**Self-Evaluation - Update and Complete**

Employee Name

<table>
<thead>
<tr>
<th>Job Title</th>
<th>Manager Name</th>
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<tbody>
<tr>
<td>TRAINER &amp; INSTRUCTIONAL DESIGN</td>
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<tbody>
<tr>
<td>Evaluation in Progress</td>
<td>09/14/2021</td>
</tr>
</tbody>
</table>

Enter your ratings and comments for each applicable section and save. When you have finished updating your evaluation select the Complete button to save your changes and send this document to your manager for review.

- **Goals**
- **Core Values**
- **Operation Excellence**
- **Personal Growth**
- **Summary**

**Section 5 - Overall Summary**

Employee Rating

Comments:

![Comment Section]

(Click to expand comment section)
## Self-Evaluation – Summary

<table>
<thead>
<tr>
<th>Proficiencies</th>
<th>Numeric Rating</th>
<th>Description</th>
</tr>
</thead>
</table>
| 1. Does Not Meet Expectations | 1.00 | While this employee may meet expectations some of the time, the employee needs improvement in many of the significantly important requirements of the job or goals established for the year. A corrective action plan may be necessary to address performance and/or behavioral deficiencies.  
If an employee is rated "Does Not Meet Expectations," please provide a comment. |
| 2. Somewhat Meets Expectations | 2.00 | Employee often meets the requirements of the job. However, sometimes their performance is in need of improvement.  
This rating may also be used for employees new in the position who have not yet acquired/demonstrated core competencies or may need some supervision or instruction. |
| 3. Meets Expectations | 3.00 | An employee rated in this category is a strong solid performer whose performance most often meets the requirements of the job. Occasionally, this employee may exceed expectations of the job.  
This rating may also be used for employees new in the position who have not yet acquired/demonstrated core competencies or may need some supervision or instruction.  
If an employee rated "Meets Expectation," no comment is needed. |
| 4. Exceed Expectations | 4.00 | Employee is strong solid performer whose performance consistently meets the requirements of the job. Occasionally, this employee may exceed expectations of the job. |
| 5. Role Model | 5.00 | An employee rated as "Role Model" consistently performs above that which is required. In addition, he/she may often make unique contributions and achieve exceptional accomplishments.  
If an employee is rated "Role Model," please provide a comment. |
Enter your ratings and comments for each applicable section and save. When you have finished updating your evaluation select the Complete button to save your changes and send this document to your manager for review.
In this section of our agenda we covered:

- How to login to ePerformance in PeopleSoft
- How to enter Goals
- How to access the Self-Evaluation portal

What questions do you have?
Goals

- All employees, in conjunction with their manager, develop 3-5 goals at the beginning of the performance year
- Rating is ‘Goal Achieved’ or ‘Goal Not Achieved’
- Creating realistic goals at the start is important!
- Some goals more strategic in nature, some more task oriented
- We’ll be using the SMART Goal model
- Let’s look at what SMART goals are & how to write them
Setting SMART Goals

• In the Chat box
• How many of you have ever heard the term ‘SMART Goals’?
• What does ‘SMART’ stand for?
  • Specific
  • Measurable
  • Achievable
  • Relevant
  • Time-based
## Goals

<table>
<thead>
<tr>
<th>S</th>
<th>Specific</th>
<th>Clear description of the topic/task of the objective</th>
</tr>
</thead>
<tbody>
<tr>
<td>M</td>
<td>Measurable</td>
<td>Quality, quantity, timeliness, and/or cost effectiveness</td>
</tr>
<tr>
<td>A</td>
<td>Achievable</td>
<td>Realistic &amp; within the employee’s control (not overly dependent on outside sources)</td>
</tr>
<tr>
<td>R</td>
<td>Relevant</td>
<td>Consistent with the employee’s role in the workplace</td>
</tr>
<tr>
<td>T</td>
<td>Time-Based</td>
<td>There is a timeframe associated with completion</td>
</tr>
</tbody>
</table>
Setting SMART Goals

Why is it important to clearly define goals?

- Communication back and forth between employee and manager
- Employee will know the standard to strive for
- To make sure they are attainable and realistic
- Both employee and manager better able to measure and rate performance
- To make sure employee time and effort is in line with organizational priorities
Specific

Goals should be simplistically written and clearly define what the employee is going to do.
Specific is the **What**, **Why** and **How**

Example:

By September 1, 2020 implement a new performance management system for Classified and A&P staff using clearly defined processes and guidelines so employees and managers can more competently evaluate performance and establish career development paths.
Measurable

Measureable so there is tangible evidence that the employee has accomplished the goal. Entire goal statement is a measure; usually several short-term or smaller measurements are built into the goal.

Example:

By September 1, 2020 implement a new performance management system for Classified and A&P staff using clearly defined processes and guidelines so employees and managers can more competently evaluate performance and establish career development paths.
Achievable

Stretch the employee slightly to feel challenged; defined well enough so employee can achieve them; employee must possess knowledge, skills, abilities to achieve the goal

In order for an employee to reach this goal:

• They must have a skill set (in area of performance management) that allows them to understand the nature of the goal
• The goal must present a large enough challenge for the employee to remain interested in/committed to accomplishing it.

An employee can meet almost any goal when:

• A solid plan has been set
• Established timeframes allow employee to carry out necessary steps one at a time
• Employee will be able to achieve goals that may have seemed impossible at the beginning
• If a goal is impossible to achieve, the employee may not even try
Relevant

Goals should measure outcomes (not daily activities or tasks)

The goal makes sense within the employee’s job function.

It is relevant to the job, will improve the department or division in some way and align with UTSA’s strategic initiatives.

The result of a relevant goal is a process that allows employees and managers to better evaluate performance and develop careers. The goal focuses more on strategy, and less on tasks.
Time-based

Goals should be linked to a timeframe that creates a practical sense of urgency
Or results in tension between the current reality and the vision of the goal
Without such tension, the goal is unlikely to produce a relevant outcome

Example:

By September 1, 2020 implement a new performance management system for
Classified and A&P staff using clearly defined processes and guidelines so
employees and managers can more competently evaluate performance and
establish career development paths.
SMART Goal Example

Learn **Articulate Storyline software** in order to develop online learning and create from scratch at least one **new online learning module** for **UTSA employees** by the **end of August 2021**.
SMART Goal Example

Organize biweekly meetings with colleagues from other UTSA departments to improve my knowledge of university structure, roles and decision-making within the first quarter of the new performance year.
SMART Goal Example

Make strides in improving our customer service delivery.

Implement an automated customer service ticketing system for our department by August 31, 2021 in order to log service requests by category and to solicit feedback from our customers on a rating scale to measure timeliness and effectiveness of our service delivery.
Your turn to write a goal

• For yourself or one of your subordinates
• Think of the job and your areas of work
• Think of the level of expertise and what would be a stretch but attainable
• Write at least one SMART goal
• Specific, Measurable, Achievable, Relevant, Time-based
• Emphasize the strategic nature of the goal

Individual writing time (3 min.)

Next, you will be in a small break out room with other participants

Zoom break out rooms (8 min.) – if there is extra time, write a second or third goal
Introduction to Performance Management at UTSA

Looking back at what we covered in class today:

• UTSA’s new Performance Management process
• Overview of the new process – what, why, who, where, when
• The ePerformance platform in PeopleSoft
• SMART Goals
Resources

- People Excellence created a website dedicated to UTSA Performance Management
  www.utsa.edu/hr/performance-management

- Resources include Job Aids & Videos

- For Managers
  - How to develop SMART Goals
  - How to rate Core Values & Competencies

- Communications and reminders will be sent throughout the performance year from People Excellence to managers and to all employees

- HR Business Partners are also an important campus resource for all employees

- Visit www.utsa.edu/hr/hrbusinesspartner or Email HR Business Partners: HRBP@utsa.edu
More facilitator-led sessions in October

Go to MyTraining

• https://mytraining.utsa.edu/classroom
• Click Schedule to search for classes in date order

Training is called:

Introduction to Performance Management at UTSA
(course code SD 640)
Several dates and times throughout October
Closing Activity – Write 3 Commitments

+ 1 commitment about your SMART goals
+ 1 commitment about ePerformance
+ 1 thing you learned that you will share with a colleague

= Your 3 Commitments for Action
Introduction to Performance Management at UTSA

Thank you!

For additional information contact:

UTSA People Excellence Talent Management Team

Email: Training@utsa.edu

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