We called the guide “YOU-tilization” because the LIFE performance appraisal is aimed at individuals. It’s about making personal and professional growth work for you. It’s about taking responsibility for what you put into your work and what you get out of it.

This guide has been adapted from the Spring 2012 FSDP presentation to assist the LIFE community in using the Performance Appraisal effectively.

If you have additional questions about accessing Review Snap, please contact karla.ruppenicker@life.edu. If you have questions about utilizing the performance appraisal content, contact rebecca.koch@life.edu.

Remember that 2012 is our “expanded beta test” year. This is the time for all supervisors and departments to determine how they will most effectively develop for their use both the performance appraisal content and the Review Snap structure for intradepartmental appraisal documentation and communication.

Remember also that appraisals are a tool that are intended to support regular conversations about performance, aimed at growth, development and improvement - not simply documents to be filled out hurriedly before some deadline, with little to no communication beforehand.
This guide covers:

- Accessing Performance Appraisal online in Review Snap Journal
- Goals
- Essential Job Functions, PA-style
- Faculty, Staff and “community”
- Exercise – “translating” Essential Job Functions into BARS
- Developing and Entering Goals
This is a brief overview of using the performance appraisal in Review Snap.

Review of:
- Accessing and logging into the Performance Appraisal in Review Snap
- Saving and re-accessing
  - Finalizing PA completes it, sends it to supervisor and makes it inaccessible to further editing
- Using the journal effectively
  - Document performance strengths, victories and challenges/stretches

- Accessing and documenting Goals will be addressed in greater detail following the Performance Appraisal Content section of the guide.
  - Will discuss PA and then return to logistics of entering goals
  - Employees with existing goals, mutually agreed upon with their supervisor, should enter those goals into Review Snap now (prior to April 2, per the memo that went out)
    - Supervisors are notified by Review Snap emails when goals are entered – which can be the “trigger” for the Employee/Supervisor conversation needed to finalize employee goals
  - For new goals, in preparation for presentation to supervisor, employees can enter in the Journal their ideas about what they’d like to accomplish goals –or, straight into the Goals section (with automatic notification of the entry going to the supervisor)
To access the Performance Appraisal (PA) in Review Snap online from the LIFE home page:

- Click on the “Faculty & Staff” link
• Look on the lower left hand side of the webpage for the section labeled “Human Resources”
• Click on the list item labeled “Review Snap”
To create a shortcut from your desktop to the Review Snap login in page:

Copy URL ([https://www.reviewsnap.com/](https://www.reviewsnap.com/)) from the “address line” in your browser

Right click on your Desktop

Select New > Shortcut

Follow the Wizard instructions (asking you to paste in Review Snap URL and Finish)
   a) Your user name and password were emailed to you from info@reviewsnap.com. Check your Inbox and Junk Mail.

2) Your User Name is your full email address (format: Jane.Doe@life.edu)

3) Your temporary password will be included
   a) Change your password in the My Account tab after you've logged in

NOTE: If you have not previously accessed the PA in Review Snap, you should be able to request a new password by clicking “Forgot Password?” If you are unsuccessful, please contact karla.ruppenicker@life.edu.
   a) Your user name and password were emailed to you from info@reviewsnap.com. Check your Inbox and Junk Mail.
2) Your User Name is your full email address (format: Jane.Doe@life.edu)
3) Your temporary password will be included
4) You’ll be prompted to select a new password
   a) You can change your password at any time after you’ve successfully logged in by clicking on the “Manage Reviews” tab and then on the “Update Employee Information” hyperlink in the “Actions” column
The first screen you’ll see once you have updated your password will contain the LIFE logo and tabs underneath that read, “Administration,” “Review Process,” “Review Setup,” and “Reporting”

Next, you will see “Sub-Tabs” that read “Manage Employees”, “Manage eSignatures,” and “Create Journal Entries”

Select “Manage Employees”
The Manage Employees page has two sections, shown in side-by-side columns labeled “Employee Information” and “Actions.”

The “Employee Information” column contains the information about how you are listed in Review Snap. Your position title is a link to your job description.

- **NOTE:** If your job description is not current, please notify your supervisor and HR so that you can receive information about the update process.
3) The “Actions” column includes:

- Create or Complete a Review
  - For self-appraisal
- Manage Goals
  - Employees can enter their goals here, following a collaborative conversation with their supervisors after mutually agreed upon goals are identified
  - Employees, particularly faculty, should go ahead and enter their current, mutually agreed upon goals
- Manage 360 Degree Surveys
  - This option may not be available on all employees’ screens; this is an option we will be working to incorporate in the Appraisal process over the next several months
- Create/View Journal Entries
  - Will take you to the Journal Entry screen where you can keep notes on your performance to include in conversations with your supervisor
  - Allows you to upload files as reminders or support for performance notes/conversations points (supported file types are listed)
- Update Employee Information
  - This is where you can change your password
Selecting “Create or Complete a Review” from the Actions column will take you to the PA, to the first section, “An Attitude of Helpfulness.” Once you’ve completed your rating for all of the competencies or “questions” in that section, you will need to proceed to the next section.

At the bottom of the “Attitude of Helpfulness” Competencies section, you’ll see the names of the next Competencies sections, each labeled with the name of the Standard of Lasting Purpose (or Service Standard) being measured. You’ll need to click on the each “bar” to open up the next section before proceeding to the finalization section by clicking on “Next.”
Saving Your Ratings

When logged in to create or complete a review, the following options are available at the bottom of each page:

- **Next** – will go to next screen (only after you’ve completed all of the four Service Standards ratings)
- **Save Only** – will save your input so far (and it’s always a good idea to save your work periodically) but will keep you in the appraisal
- **Save and Exit** – will save your input and exit the appraisal
Re-accessing the appraisal after logging out

- Log in using the methods previously described
- Select the “Manage Employees” in the sub-tab under the “Review Process” tab
- In the “Actions” Column, select “Create or Complete a Review”
Finalize (with CAUTION – finalizing submits your appraisal to your supervise and “freezes” it from further changes)

Select any of the following:

- View (view only) – this option is available even after your appraisal has been finalized
- Continue – will allow employee to continue review as long as it hasn’t been finalized
- Finalize – Selecting this option, you will finalize review and electronically route to Supervisor for approval.

- **NOTE:** Finalizing the review/appraisal will prevent any further changes; you will not be able to update or change the appraisal after it has been finalized

If you have finalized your appraisal prematurely, contact Karla.Ruppenicker@life.edu for assistance.
Finalize (again, with CAUTION)

- **Finalize** – Selecting this option, you will finalize review and electronically route to Supervisor for approval.

  - **NOTE:** Finalizing the review/appraisal will prevent any further changes; you will not be able to update or change the appraisal after it has been finalized.

If you are not ready to finalize and have other work to do within Review Snap, this set of selections describes the options available to you.
In the Manage Employees sub-tab of the Review Process tab, from the “Actions” column, select “Create/View Journal Entries”

The purpose of the journal entries is to track your performance throughout the entire year.

Using the journal helps:
- Ensure more accurate reviews
- Better tracking of progress on goals
- Provide notes regarding accomplishments (and challenges) for the year
Four options:

1. Create a New Journal Entry;
2. Print Journal Entries; or
3. View existing journal entry
4. Update existing journal entry
• Private Entry – allows you to journal private notes. No one other than you can access your private entries
• Journal Title - should reflect type of journal entries (initiative, merit, recognition, disciplinary, etc.)
• Type your journal entry in the space provided
• You can attach documents such as past reviews, emails, commendation documents, program/certification completion documents, disciplinary documentation, etc.
• **Note:** Document Format (* PDF, XLS, CSV, DOC, JPG, or GIF Only)
• Click “Create” after your entries are completed
For those unable to attend the Performance Appraisal YOU-tilization session (and who may not have even been born when this particular ad appeared), here’s the link to the video clip we used to illustrate the difference between the Performance Appraisal and Review Snap).
So... Where’s the Beef?
The “beef” or the meat – or the power – of the Performance Appraisal (PA) tool is really in the content. That’s the part that defines the performance behaviors on a scale from 1 (destructive) through 4 (anticipatory).

Review Snap is the bun – the part that serves as a vehicle or frame to carry the PA content.
The “beef” is found in the Performance Appraisal content. That’s where the power for improvement, authenticity and difficult/meaningful conversations is found.

Review Snap, the online platform, is simply the bun. It’s the vehicle for transporting our input from employer to supervisor and back again. It’s a notebook.
What do we know about the new performance appraisal?

The new appraisal is developmental and aspirational – it assumes that, on their own when given the support, people aspire to learn and grow and improve. Accordingly, the demonstration of continuous improvement through appropriately managed goals is expected at all levels, individually and departmentally.

Compare and contrast old evaluation with new Performance Appraisal

• You can use the new one to be mediocre just like you could with the old one
  • You can check all 3s for yourself or others, without thinking or providing any input toward growth and improvement
  • Stay stagnant, stuck
• You can use the journal strictly for self aggrandizement and time-wasting chronicling of every little accomplishment
  • OR, you can use the journal to remind yourself of ways in which you could have performed better – privacy options allow this to be strictly for your own use
• Provides greater autonomy, less paternalism
  • We can work because “daddy says” or because we’re self-directed adults seeking to do our best
• Provides a roadmap to excellence
  • Specific behavior expectations are detailed in the rating scales
  • 3 and 4 behavior descriptions provide a guide for how to achieve better performance
What do we know about the new performance appraisal and performance management process?

- HR will administer documentation and record keeping – the filing, individuals and departments will jointly manage their performance.
- Everyone is responsible for effectively managing his/her own performance with supervisor oversight.
- Supervisors are responsible for ensuring regular, effective use of the PA process including providing regular feedback to their reports.
  - The PA Advisory Council will be formed, consisting of all supervisors, so that the process and the supervisors are well supported in their responsibilities to the Performance Appraisal process.
- Strategic Stewards are responsible for ensuring the Performance Appraisal process is managed in a way that supports the University’s strategic goals.
  - A Performance Appraisal Management Committee, under the oversight of Drs. Tim Gross and Cynthia Boyd and including HR, Service Initiatives, faculty and staff representatives, will assist with this process.
The Performance Appraisal is supported by the online technology provided via Review Snap. Documentation and record-keeping become less daunting, allowing the focus of the Performance Appraisal process to be more centered on guiding employees in the development service-based performance behaviors, knowledge and skills – and less on paperwork.

We are aiming for a paperless process. Having the Performance Appraisal in Review Snap allows us to create appraisals in a way that they can be shared between employees, supervisors, HR and Faculty Affairs without ever having to generate any paper. Review Snap also allows for capturing similarly shared notes on performance as well as paperless duplication of supplemental documentation such as certificates of continuing education, commendations, thank you notes, etc.
The Performance Appraisal uses Behaviorally Anchored Ratings Scales (BARS) to assess job performance. Every job description on campus lists “Essential Job Functions” (EJF) for doing the particular job being described. The “beef” is found in contemplating and appraising job performance by combining the BARS with the EJF.

For faculty, the EJF are very similar across all three colleges with the most variation occurring between classroom and clinic faculty. For staff, the variation in EJF is much greater although similar positions (such as administrative assistant) have the most similar EJF across departments.

EJF are the minimum expectations for performing a particular job and, therefore most of the time, represent a “2” rating when employees are doing their essential job functions only with close supervision that includes reminders and prodding - in a complacent manner.

Because it essentially makes service to others “Job One” for all employees, the Performance Appraisal framework allows us to use a single, baseline instrument for assessing both faculty and staff in the performance of their work. It’s how we use it to contemplate and assess our performance, weaving together our job descriptions with the Performance Appraisal content, that allows the PA to form the basis of assessing ourselves and one another on how we perform all aspects of our work when viewed through the lens of serving others.
From our Performance Appraisal workshops last fall (2011), you’re recall that the ratings for the various performance competencies are behavior-based. Listed on this slide are the description guidelines underlying the Performance Appraisal competencies; each competency describes four behaviors corresponding with the descriptors ranging from 1 (destructive/apathetic) behaviors through 4 (anticipatory/proactive).

The behaviorally anchored ratings scales (BARS) used for each of the PA competencies use this structure to describe the four levels/types of behaviors associated with each competency.
Essential Job Functions

1. Doesn’t do it – or does it antagonistically
2. Does it (and no more, last minute)
3. Does it well and timely
4. Does it well and timely and in a way that is future-oriented; facilitates wider effectiveness, communication and/or relationships

In order to contemplate and appraise individuals’ job performance using the PA, the Essential Job Functions provide the bridge between the PA and the job descriptions. All job descriptions on campus contain Essential Job Functions.

The first step is to determine where each EJF best fits into one of the PA competencies (the SLP/PA Advisory Council, soon to be expanded to include all supervisors, will be completing this work). Then, second, it’s helpful to “translate” the Essential Job Functions into “PA parlance” or BARS-type language. Using the same framework (1 = Destructive/Apathetic, 2 = Complacent/Compliant or Careless, 3 = Responsive, 4 = Anticipatory/Proactive) as the BARS, the EJF begin to look something like this:

1. Destructive/Apathetic = Doesn’t do the EJF – or does it antagonistically
2. Compliant/Complacent/Careless = Does the EJF (and no more, last minute, requires reminders and/or prodding)
3. Responsive = Does the EFJ well and timely, without reminders, because the employee is generally and consistently responsive to his/her job description; no one has to think twice about whether he/she is carrying out their EJF
4. Anticipatory/Proactive = Does the EJF well and timely and in a way that is future-oriented and mission-supportive; facilitates wider effectiveness, communication and/or relationships

All Essential Job Functions carried out in a simply compliant or complacent manner would constitute “2” behavior. So, doing one’s job in a way that requires close supervision, regular supervisory reminders or with only the bare minimum effort would be rated “2” on the Performance Appraisal.
This is an example of a faculty Essential Job Function (EJF) that is specific to the Sport Health Science or Graduate program. Faculty job descriptions from all programs/colleges contain a comparable EJF that says essentially the same thing, though the wording may be a bit different.

This one, “Develop and present work schedule to the Department Head and Dean,” would be rated using the PA under the Attitude of Helpfulness standard as part of the competency, 1-F, “ Appropriately and Reliably Records Information.”
Performance Appraisal Content
I-F) Appropriately and Reliably Records Information

An Attitude of Helpfulness

1. Fails to record or inappropriately records necessary information and/or fails to distribute it
2. Records and distributes necessary information only when instructed
3. Records and appropriately distributes necessary information when requested
4. Seeks more effective ways to reliably record and distribute information, as appropriate, in its most useable and accessible form

The BARS scale for this competency, as it appears in the PA, describes the four levels of behaviors associated with reliably recording information.
As a way to further explore self appraisal in terms of 1-4 behaviors within the context of a specific employee’s performance, it can be helpful to translate the Essential Job Functions (EJF) for that employee’s position into Behaviorally Anchored Rating Scales (BARS).
So, the EJF, “Develop and present work schedule to the Department Head and Dean,” as performed by someone behaving in a destructive or apathetic manner would result in behavior such as that described in the slide above.
Compliant or Complacent
(Can include Careless)

- Develop and present a work schedule to the Department Head and Dean (with reminders or prodding, at the last minute or late)

The EJF, “Develop and present work schedule to the Department Head and Dean,” as performed by someone behaving in a compliant or complacent manner – someone who’s careless in the classic sense that he or she “couldn’t care less.”
The EJF, "**Develop and present work schedule to the Department Head and Dean,**" as performed by someone behaving in a responsive manner.
The EJF as performed by someone behaving in an anticipatory or proactive manner. This person has behaved consistently in a way that reflects “Level 3” performance plus has exhibited additional positive behaviors resulting in a rating of “Level 4.” This faculty member has performed in a way that, if performed similarly by all faculty members, would allow us to eliminate the tedious work of producing paper schedules kept by the department admin in a notebook. Any LIFE employee needing to schedule a meeting with faculty members would be able to quickly access their free/busy time in the Outlook Calendar Scheduling Assistant (details would still be private except to those authorized by the Calendar owner; otherwise, only “place holder” bars showing time as free, busy, out of office or tentative are available to users not authorized by the owner).
Let’s explore the same approach with a staff EJF. Although staff job descriptions are “all over the map” compared to faculty job descriptions, there are a few that are very similar. Administrative Assistant positions all share most/all of the EJF so let’s start there.

As mentioned earlier, performing EJF in a way that is minimally compliant, requiring close supervision through reminders and prodding, constitutes Level 2 performance. Therefore, the EJF above, describing one aspect of the administrative Assistant EJF, describes generally compliant or complacent (“2”) behavior.
An Administrative Assistant EJF, describing generally destructive or apathetic (“1”) behavior.
Again, the basic EJF describes generally compliant or complacent (“2”) behavior.
An Administrative Assistant EJF, describing generally Responsive (“3”) behavior – this admin is sorting the mail with the understanding that his/her supervisor or others in the department don’t need a big U-Line catalog or other unsolicited mail, and goes ahead and recycles it.
An Administrative Assistant EJF, describing generally anticipatory or proactive ("4") behavior. Note that "4" behavior includes all the responsive behaviors associated with "3" behavior plus additional positive behaviors. As an example, this Admin calls the phone number at the bottom of the fax ads that come to the copier from time to time – and removes the department fax number the vendors’ lists.
Our job responsibilities aren’t the only responsibilities we have as members of the LIFE community. We’ve made personal and departmental commitments to building relationships, particularly those that optimize functioning. This means that we must also be “good neighbors” and consider the impact of all our actions – not just our job performance – on our neighbors.
Someone who’s apathetic or destructive in sharing break rooms behaves in ways that are not considerate of others. The resentment caused by this type of behavior can easily overshadow even excellent job performance standards.
The compliant (even the complacent) employee cleans up the mess – maybe not that well – but makes at least a stab at it.
The responsive microwave user usually manages to prevent explosions (always a good thing!) and, in the unfortunate explosive event, cleans up the microwave better than before.
The Anticipatory or Proactive microwave user finds a way to think ahead and avoid similar situations. In this model, the employee ensures proper care to prevent untoward microwave explosions!
See the top five Essential Job Functions for faculty and staff on the next two pages.
Top Five Faculty Functions

1. Prepare syllabus
2. Prepare -
   - Clinical applications and classroom presentations
3. Deliver -
   - Clinical applications and classroom presentations
4. Assess –
   - Clinical applications and classroom presentations
5. Accurately calculate and record grades

Top Five Faculty Functions

All faculty job descriptions contain these five Essential Job Functions. They may be worded differently but, in one form or another, each of them is in the job descriptions for all three colleges’ faculty job descriptions.

For this exercise, select one EJF (#3 suggested for exercise) and translate it to PA-style BARS, 1 through 4.

In other words, how does a “1,” someone delivering clinical or classroom education in an apathetic or destructive way behave?
How does someone who’s a “2,” someone who’s merely compliant or complacent, behave when delivering clinical or classroom education?
What does “3” behavior look like from someone providing responsive classroom or clinical education to his or her students?
What does “4” behavior look like from someone who’s anticipatory and proactive in delivering classroom or clinical education?
**Top Five Staff Functions?**

1. Provides support for all dept. functions
2. Maintains equipment, supplies and inventory
3. Attends all department meetings
4. Maintains professional appearance
5. Maintains files, produces accurate, timely reports

All staff job descriptions contain these five Essential Job Functions. They may be worded differently but, in one form or another, each of them is in the job descriptions for all staff positions.

For this exercise, select one EJF (#3 suggested for exercise) and translate it to PA-style BARS, 1 through 4.

In other words, what does “1” behavior look like when someone is attending department meetings in an apathetic or destructive way?
What does “2” behavior look like from someone who’s merely compliant or complacent when attending a department meeting?
What does “3” behavior look like from someone who’s attending a departmental meeting in a responsive way?
What does “4” behavior look like from someone who’s anticipatory and proactive in attending department meetings?
Setting and Managing Goals
Employee goals form the foundation of the Goal Hierarchy and support each level above it.
The single most important information one can take from this presentation is that

“Goals need to be clear ”
Create Goals

NOW....
(or earlier) is/was the time to start thinking about goals for this year

...here are some strategies.

Goals did not automatically populate in Review Snap. They will need to be entered from your last mutually agreed upon conversations with your supervisor.

For faculty:
A good way would be to review your last (most recent) evaluation documents:
• the KPO (key performance outcomes), and even more so,
• the PDP (professional development plan)

For staff:
Review previous evaluations for the goals and objectives you and your supervisor agreed you’re to be working on now.

Look over your accomplishments (for faculty, KPO) and your plans (for faculty, PDP) and ways that you can improve on them, AGAIN remembering to be

SPECIFIC in describing the intended outcomes of your goals, making sure that you’re working on MEASURABLE outcomes that are realistically ACHIEVABLE with clear RESULTS that can be MEASURED and are TIME BOUND in the form of deadlines for their successful accomplishment.

Many have the tendency to set goals that are far too lofty and can never be achieved, and then feel distraught when the time period ends and results have not been accomplished.

BACK OFF – be gentle (but not slack) with yourself – be REALISTIC – look at what you can (along with everything else your life entails) ACTUALLY accomplish WITHIN the allotted time frame.
NOT SO SMART (Faculty): “Do more research”

SMART: “Create a peer-reviewed survey instrument, and develop a timeline within the next 3 quarters for initial distribution and preliminary data collection 1 year from the end of this quarter.”

NOT SO SMART (Staff): Improve service to department and students

SMART: By the end of the current quarter, using input from all department members and previous feedback from students, create a survey asking students about each aspect of the service our department provides. Administer survey prior to Week 4 of the following quarter. Identify top three service improvement needs and develop plans to ensure improvement by the end of the quarter.
What we know already:

Below is an example of one faculty member’s use of Life University’s “generic PDP,” which has been in use for several years. One method of identifying and developing appropriate goals might be to start with the PDP template, apply the SMART rules to accomplishments you’d like to attempt, discuss your ideas with your supervisor, and come to an agreement of which of your goals would also best support departmental and University needs, are realistic and achievable for the identified time frame.

PROFESSIONAL DEVELOPMENT PLAN
Life University

I. TEACHING/INSTRUCTION
   • Expand current Bibliographic Instruction workshops to reinforce concept of “information literacy”
   • Develop Word instruction classes to be held at regular intervals
   • Improve current informational handouts

II. SERVICE
   • Serve as editing liaison for National Library of Medicine database
   • Volunteer at American Library Association’s annual meeting
   • Serve on technology committee for Atlanta Health Sciences Library Consortium

III. SCHOLARSHIP/RESEARCH
   • Submit a paper on newest trends in electronic resource management (ERM’s) to The Serial Librarian
   • Write a paper to be delivered at the annual conference of the Georgia Health Sciences Library Association (GHSLA) on maximizing online resources on a limited budget
Goals – Faculty Example

Example - Teaching Effectiveness:

Using information gained from student feedback, I plan to initiate X teaching strategy to examine if feedback improves in Q sections of _____ course next quarter/in 2 qtrs/next year). I will report next quarter/ ½ year/year of my experience implementing this goal....

This goal is from the following link:

Here’s another example of a faculty goal from Franciscan:

Scholarship:
I plan to write a reflection article based upon an attempted teaching strategy in X course to examine if it improved student attainment of course goals (student learning) which can be published in an assessment or teaching/learning journal.
I would like the assessment office / center for teaching and learning to help me by ____. (List specific help you would need if this were a goal you actually want to achieve)
Additional Faculty Goals Resources

In the Notes section below are listed the website URLs discussed at the winter/spring 2012 FSDP Self-Appraisal presentations. Please click on the hyperlink or copy and paste into your browser to access examples and suggestions on self-appraisal and goal setting that may be helpful when developing goals and making journal entries. Please be patient. If you click on the link and you get a page of garbled letters and symbols (especially for the pdf links), just locate and click your cursor in the URL line in the server (don’t change or add anything) and hit enter; this should bring you to the direct page.

http://www.ambpeds.org/education/education_domainsGoals.cfm
http://www.chattanoogastate.edu/teachingandlearning/forms/Goal Setting FAQs.pdf
http://www.projectsmart.co.uk/8-strategies-for-achieving-smart-goals.html
http://www.cedanet.com/indiana.html
http://advan.physiology.org/content/34/2/35.fulltext
http://pareonline.net/pdf/v11n10.pdf
http://www.unr.edu/educ/docs/pdf/Kac/professional_dispositions.pdf
http://www.ivcc.edu/uploadedFiles/academicaffairs/Tenured/Tenured%20Faculty%20Appendix%20C%20Faculty%20Goals%20and Development%20Plan%20_FGD.pdf
http://www.ambpeds.org/education/education_domainsGoals.cfm

Please use these as suggestions or ideas, but refer to the Life University Faculty Handbook and job description (provided to you by your supervisor and found under “Employee Information in Review Snap”) for specific pertinent information to guide you. If additional relative sites are located, please forward them so they can be added for others to access.
This section will discuss and offer resources for developing goals that are appropriate for staff.

There are basically four categories of goals: Productivity Goal, Efficiency Goals, Educational Goals and Personal Development Goals. Examples and definition of each category are found of the next four pages.
Productivity Goals

Productivity can be defined as the amount of productive work accomplished within a specific time-frame. Productivity can be measured in units produced, customers served or other measures of output. Setting productivity goals for individual employees has the long-term effect of increasing overall company productivity, allowing a company to get more work done in the same amount of time and with the same number of employees. An example of a great productivity goal for an assembly line worker, using the four characteristics of an effective goal, could be "to increase the number of units produced per hour by 5 percent between each semi-annual performance review." An example of a great productivity goal for a data-entry clerk could be "to increase typing speed by five words-per-minute each month until reaching 60 words-per-minute."

Efficiency Goals

Efficiency is a similar concept to productivity, but it approaches output in a different way. Efficiency can be defined as the speed, accuracy and consistent quality with which an employee works. More efficient workers make fewer mistakes and can increase their productivity without decreasing their quality standards. An example of a great efficiency goal for a customer-service representative could be "to keep the number of service calls which last over five minutes to under ten per day," to encourage the rep to interact more strategically with customers and anticipate their needs.

Educational Goals

Educational achievement can make employees more valuable to their employers, in addition to enriching their lives in other areas. Setting goals is a proven way to reach educational milestones, and companies can benefit from collaboratively setting educational goals with their employees. Valuable educational achievements include things such as college degrees, company-sponsored training programs and professional certifications. An example of a great educational goal for an aspiring manager could be "to fulfill all seven management training modules before next year's performance review." An example of a great educational goal for someone at the top of their pay grade could be "to enroll in an Associate's degree program this Fall semester, and to complete my degree within three years."

Personal Development Goals

Employee performance relies on a range of qualitative factors in addition to easily measurable quantitative issues. Intangible characteristics such as leadership skills, communication effectiveness, conflict management skills and strategic contributions in team settings can be just as important to employees' success and their employers' competitiveness. Examples of great intangible goals for personal development include "to decrease the number of negative confrontations at work between each performance review until no confrontations arise," or "to speak up and contribute in all team meetings during a specific project."

The first link provides a sort of rubric containing questions designed to assist in the development of SMART goals.

The second link is to an article entitled, “Writing Good Work Objectives”

The third link will help you explore the value of excellence in customer service.
The first screen you’ll see once you have updated your password will contain the LIFE logo and tabs underneath that read, “Administration,” “Review Process,” “Review Setup,” and “Reporting”.

Next, you will see “Sub-Tabs” that read “Manage Employees”, “Manage eSignatures,” and “Create Journal Entries”.

Select “Manage Employees”
1) The Manage Employees page has two sections, shown in side-by-side columns labeled “Employee Information” and “Actions”

2) The “Actions” column includes:
   a) Create or Complete a Review
      a) For self-appraisal
   b) Manage Goals
      a) Employees can enter their goals here, following a collaborative conversation with their supervisors after mutually agreed upon goals are identified
      b) Employees, particularly faculty, should go ahead and enter their current, mutually agreed upon goals
   c) Manage 360 Degree Surveys
      a) This option may not be available on all employees’ screens; this is an option we will be working to incorporate in the Appraisal process over the next several months
   d) Create/View Journal Entries
      a) Will take you to the Journal Entry screen where you can keep notes on your performance to include in conversations with your supervisor
      b) Allows you to upload files as reminders or support for performance notes/conversations points (supported file types are listed)
   e) Update Employee Information
      a) This is where you can change your password
This will take you to the Review Process tab screen
REVIEW PERIOD SELECTION

1) Use the drop down arrows

2) Choose the appropriate designation for the specific use

- If you are a **new hire** doing your 90-day review, select the middle option, “90 Day Review”
- If you are an **employee**, use the “2012 – Employee” selection for your self-appraisal
- If you are a **supervisor**, use the “ANNUAL 2012 – SUPERVISOR” review for your self-appraisal
- If you are a **supervisor**, reviewing one of your reports who is also a supervisor, use the “ANNUAL 2012 - SUPERVISOR” selection for your appraisal of that report
- If you are a **supervisor**, reviewing a report who is NOT a supervisor, use the “Employee” selection for your appraisal of that report
REVIEW PERIOD SELECTION

1) Use the drop down arrows

2) Choose the appropriate designation for the specific use

- If you are a **new hire** doing your 90-day review, select the middle option, “90 Day Review”
- If you are an **employee**, use the “2012 – Employee” selection for your self-appraisal
- If you are a **supervisor**, use the “ANNUAL 2012 – SUPERVISOR” review for your self-appraisal
- If you are a **supervisor**, reviewing one of your reports who is also a supervisor, use the “ANNUAL 2012 - SUPERVISOR” selection for your appraisal of that report
- If you are a **supervisor**, reviewing a report who is NOT a supervisor, use the “Employee” selection for your appraisal of that report
After you’ve selected the appropriate Review Period designation for your specific use, 3) Select “Add a Goal” to the left, just above the blue bar just above the center of the page.
Again, once you've had a conversation with your supervisor and have identified your mutually agreed-upon goals, you’re ready to enter your goal in the “Goal Description” area.

“Quantitative Goals” refer to job functions or requirements that can be counted or measured externally with complete objectivity, such as “class pass rate” or “x dollars raised” or “x patient visits.” The quantitative goals can refer to both items to be increased (students enrolled) or items to be decrease (student complaints). Quantitative Goals will most often be associated with Productivity Goals.

“Current Level” refers to the starting point, or value of “x”, at the time of the appraisal.

Check the “Smaller Current Level Value is better” box for items that are being increased as part of one’s job performance.

“Due Date” is a supervisor/employee decision and “Status” may be used to communicate how far along you are in achieving the goal.
When entering a new goal, select the “New Goal – Not Yet Started” option.

As for the other options, when determining your goal’s status, you have several options to describe how far along you are in achieving the goal.

When determining your goal’s status, it may a good time to contemplate how realistic the goal is/was. Don’t forget that even if a goal is not achieved, it doesn’t mean the person or the goal is “bad.” If the goal wasn’t achieved, explore whether or not it’s a good fit with the “SMART” goal description. If not, how can you revamp it so that it is a SMART goal? Once you’ve rewritten the goal in SMART mode, then resubmit a better/newer/updated/reworked version of the goal with achievable outcomes.
Use this text area to describe the actions/tasks you’re undertaking in order to meet each particular goal.

The actions we take in pursuit of our performance goals are the foundation of the service culture at LIFE.
Use this text area to describe the actions/tasks you’re undertaking in order to meet each particular goal.

Then, when you’re done, click “Create” if you’re just entering one goal and will be saving and exiting. Click “Create and Add New Goal” if you’re on a “goal roll” and want to go directly back into “Add a New Goal” mode to enter another new goal.
A Better You – and a Better “U”!

- Once goals are developed, supervisors should discuss options and strategies with employees to help them work toward achieving those goals.

- The outcome?

- A better you and a better “U” (Life U)
What are the “stoppers” for using this (or any) new process?

Some attitudes and assumptions get in the way of our ability become service oriented or to be active participants in continuous improvement.

“It’s new and I don’t like it. What’s wrong with the old one?”

- What can we say? Trying new things keeps us from turning into moldy oldies. And, again, this appraisal assumes you want to be treated like an adult who values growth, development and improvement. It expects that you have a more meaningful “why” to doing your job that just collecting a paycheck - that you would rather be helpful than not.

“This is all about being student-centered and my job doesn’t involve students at all. So this service-based performance appraisal just doesn’t apply to me.”

The goal of LIFE’s performance appraisal is to support service to others – all others – affected by our job performance and not just students – although we hope students ultimately benefit from a service culture. Every job on campus involves service to others.

“Some jobs don’t involve people at all - they’re “behind the scenes” and involve processes more than people – so a service-based performance appraisal just doesn’t apply to them”

All jobs provide a service of some sort to others no matter how process-oriented they might be. And, everyone is expected to interact and perform in a way that supports continuous improvement. A process person would be expected to view their job performance through the service lens to find how that process can be made as user-friendly and anticipatory of future needs as possible – since people are the ultimate “consumers” of processes.
Some folks say, “I already do this. I’m already serving our students (and/or others). I’ve been doing this for 20 years. I don’t need this.”

This may be the biggest stopper of all to continuous improvement - failing to understand that there’s always room for improvement which blinds us to new ways to better help students (and/or others) or to improve our skills and knowledge.
Complaints aren’t productive or helpful. They’re not suggestions, because they’re not designed to produce positive change or directed to people who can effect change. Complaints are stoppers to constructive use of time and energy.

If they’re turned into suggestions, with accompanying ideas for improvement, then they can become the basis of goals, initiatives and/or projects aimed at creating better service.
Goals are targets on the road to personal and professional growth and continuous improvement – and we don’t tend to grow or improve from the safety of our comfort zone.

- There is no growth in the comfort zone.
- Better to find comfort in the growth zone.
This is what the Performance Appraisal in really all about – getting us outside of our stoppers and on the road toward fulfilling and worthwhile job performance.
1. Contact karla.ruppenicker@life.edu in HR to “unfinalize” Appraisals. Also, remember that you may use the PA to review and re-appraise your own performance on a regular basis to promote self awareness and growth.

2. Currently, we have not added pop up boxes for the “2” and “3” ratings since these additions are somewhat costly customizations. We did add the pop ups for “1” and “4” ratings for the convenience of the LIFE community. For now, the best way to record notes on “2” and “3” ratings will be in the Journal areas, with employees having the option of making the information private. Keeping open any Journal entries that contain topics in need of supervisor approval or input can be a very helpful communication tool. NOTE: Supervisor Journal entries cannot be viewed by employees.

3. Supervisors will be meeting regularly throughout this “beta test” year to discuss and develop supplemental materials to support the use of the PA. The SHS Faculty job description is well underway, linking the Essential Job Functions with the related section/competency of the PA.
4. All employee job descriptions, faculty and staff, are found in the “Employee Information” section of Review Snap.

5. As you will recall from the Performance Appraisal workshops last fall, all performance appraisals/evaluations are subjective. They rely on the perceptions of both the employee and the supervisor. However, because LIFE’s Performance Appraisal is behavior-based – and behaviors are observable – there is a greater degree of objectivity associated with the BARS-based rating scales. In the event an employee does not agree with a supervisor’s observations, it is hoped that an open and productive conversation will take place about the misalignment of perception. And, just as before, the employee will be able to note the disagreement.

6. The next phases of PA development will include service models and service plans for departments and processes across all University sectors. Conversations are already underway with Faculty Affairs regarding SLP-style service as a component of faculty rank and promotion; feedback from faculty would be very welcome.