Staff Performance Assessment

SuccessFactors Step-by-Step Instructions

Performance Period 5/1/2022 to 4/30/2023

# Manager Updates Weights of Goals (25%) and Competencies (75%) for 2022-2023 Performance Assessment

1. Managers will need to update the weights of both the goals and competencies sections on the 2022-2023 Performance Assessment. Goals should be reset to 25% and competencies to 75%.
2. Refer to the ***Supervisor: Evaluate an Employee’s Performance – QRG*** for detailed instructions.

# Employee Completes 2022-2023 SuccessFactors Self-Assessment (3/1/23 to 3/31/23)

1. Refer to the ***Employee: Complete Self-Assessment – QRG*** for detailed instructions.

# Manager Evaluates Employee’s 2022-2023 Performance in SuccessFactors (4/1/23 to 4/30/23)

1. Gather documentation/materials to assist with writing the performance assessment
   * Major accomplishments and projects, committee involvement, professional development, etc.
2. Review employee’s self-assessment
3. Evaluate employee’s performance taking into consideration the essential duties and responsibilities of the position. Provide specific examples for each goal and competency rating.
4. Refer to the ***Supervisor: Evaluate an Employee’s Performance– QRG*** for detailed instructions

# Manager Conducts 1:1 Meeting Performance Assessment Meeting (5/1/23 – 5/19/23)

1. Meet one-on-one with employee to deliver performance assessment
2. Refer to ***Tips for a Successful Performance Discussion*** for best practices on conducting the assessment meeting

# Manager Finalizes Employee’s SuccessFactors Performance Assessment and Submits

1. Manager reviews finalized ratings and comments written on the performance assessment
2. Manager submits performance assessment to employee for signature and acknowledgement
3. Refer to the ***Supervisor: Finalize Employee’s Performance Assessment – QRG*** for detailed instructions

# Employee Electronically Signs and Acknowledges the Performance Assessment

1. Employee enters overall comments, electronically signs and acknowledges the assessment
2. Refer to the ***Employee: Sign and Acknowledge Performance Assessment*** ***– QRG*** for detailed instructions

# Set Up Employee’s SuccessFactors Goal Plan for 2023-2024 Performance Period (May 2023)

1. Manager and Employee collaborate to create the Employee’s Goal Plan for the 2023-2024 evaluation period beginning in May 2023
2. Refer to the ***Supervisor: Set Up Employee’s Goal Plan – QRG*** for detailed instructions