PEP Overview Webinar

2016-17 Review Cycle

June 2017
Your Speaker Today

Joliett Vega-Klucevsek
Workforce Excellence Manager
Talent Acquisition and Management
Adobe Connect Functionality

Please enter your questions here
Why Are We Here?

- Performance Excellence Process (PEP)
- Your Role in the Process
- Aligning PEP with FIU’s Strategic Plan
- Online PEP Document
- Enhancements and New Features
- Resources and Training
- Professional Development Credit
PERFORMANCE EXCELLENCE PROCESS

Linking People to Outcomes
Performance Excellence Process (PEP)

Formal tool to review achievements, provide candid feedback and set measurable goals aligned with FIU’s Strategic Plan.
# Your Role in the PEP Cycle

<table>
<thead>
<tr>
<th>2nd Level Manager</th>
<th>Supervisor</th>
<th>Employee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead the way and set the tone for PEP cycle</td>
<td>Align with 2nd level manager’s goals and expectation</td>
<td>Be involved in the process.</td>
</tr>
<tr>
<td>Communicate BU’s strategic goals aligned with FIU’s Strategic Plan</td>
<td>Communicate internal deadlines</td>
<td>Use PEP as a development tool</td>
</tr>
<tr>
<td>Set expectations &amp; internal deadlines</td>
<td>Help employees understand the importance of PEP</td>
<td>Gather performance information and complete self-evaluation</td>
</tr>
<tr>
<td>Meet with supervisor(s) to align goals &amp; discuss employee performance</td>
<td>Set measurable goals and expectations</td>
<td>Meet with supervisor for formal performance review discussion</td>
</tr>
<tr>
<td>Approve PEP documents</td>
<td>Provide candid and meaningful feedback</td>
<td>Be open to feedback</td>
</tr>
<tr>
<td></td>
<td>Write Manager Evaluation and submit for approval</td>
<td></td>
</tr>
<tr>
<td>Your Role in the PEP Cycle</td>
<td></td>
<td></td>
</tr>
<tr>
<td>---------------------------</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>2nd Level Manager</strong></td>
<td><strong>Supervisor</strong></td>
<td><strong>Employee</strong></td>
</tr>
<tr>
<td>Lead the way and set the tone for PEP cycle</td>
<td>Align with 2nd level manager’s goals and expectation</td>
<td>Be involved in the process.</td>
</tr>
<tr>
<td>Communicate BU’s strategic goals aligned with FIU’s Strategic Plan</td>
<td>Communicate internal deadlines</td>
<td>Use PEP as a development tool</td>
</tr>
<tr>
<td>Set expectations &amp; internal deadlines</td>
<td>Help employees understand the importance of PEP</td>
<td>Gather performance information and complete self-evaluation</td>
</tr>
<tr>
<td>Meet with supervisor(s) to align goals &amp; discuss employee performance</td>
<td>Set measurable goals and expectations</td>
<td>Meet with supervisor for formal performance review discussion</td>
</tr>
<tr>
<td>Approve PEP documents</td>
<td>Provide candid and meaningful feedback</td>
<td>Be open to feedback</td>
</tr>
<tr>
<td></td>
<td>Write Manager Evaluation and submit for approval</td>
<td></td>
</tr>
</tbody>
</table>
# Your Role in the PEP Cycle

<table>
<thead>
<tr>
<th>2nd Level Manager</th>
<th>Supervisor</th>
<th>Employee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead the way and set the tone for PEP cycle</td>
<td>Align with 2nd level manager’s goals and expectation</td>
<td>Be involved in the process.</td>
</tr>
<tr>
<td>Communicate BU’s strategic goals aligned with FIU’s Strategic Plan</td>
<td>Communicate internal deadlines</td>
<td>Use PEP as a development tool</td>
</tr>
<tr>
<td>Set expectations &amp; internal deadlines</td>
<td>Help employees understand the importance of PEP</td>
<td>Gather performance information and complete self-evaluation</td>
</tr>
<tr>
<td>Meet with supervisor(s) to align goals &amp; discuss employee performance</td>
<td>Set measurable goals and expectations</td>
<td>Meet with supervisor for formal performance review discussion</td>
</tr>
<tr>
<td>Approve PEP documents</td>
<td>Provide candid and meaningful feedback</td>
<td>Be open to feedback</td>
</tr>
<tr>
<td></td>
<td>Write Manager Evaluation and submit for approval</td>
<td></td>
</tr>
</tbody>
</table>
## Your Role in the PEP Cycle

<table>
<thead>
<tr>
<th><strong>2nd Level Manager</strong></th>
<th><strong>Supervisor</strong></th>
<th><strong>Employee</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead the way and set the tone for PEP cycle</td>
<td>Align with 2nd level manager’s goals and expectation</td>
<td>Be involved in the process.</td>
</tr>
<tr>
<td>Communicate BU's strategic goals aligned with FIU’s Strategic Plan</td>
<td>Communicate internal deadlines</td>
<td>Use PEP as a development tool</td>
</tr>
<tr>
<td>Set expectations &amp; internal deadlines</td>
<td>Help employees understand the importance of PEP</td>
<td>Gather performance information and complete self-evaluation</td>
</tr>
<tr>
<td>Meet with supervisor(s) to align goals &amp; discuss employee performance</td>
<td>Set measurable goals and expectations</td>
<td>Meet with supervisor for formal performance review discussion</td>
</tr>
<tr>
<td>Approve PEP documents</td>
<td>Provide candid and meaningful feedback</td>
<td>Be open to feedback</td>
</tr>
<tr>
<td></td>
<td>Write Manager Evaluation and submit for approval</td>
<td></td>
</tr>
</tbody>
</table>
Aligning PEP with FIU’s Goals

• FIU BeyondPossible2020 Strategic Plan
• Specific Goals with Specific Measures
• Important to align PEP with University’s Strategic Plan
• Funding Model Based on Performance of Each University in the Florida SUS
• Competing with Other Universities
Timeline

June

6/16
• Memo to University Officers, Deans, and HR Liaisons
6/19
• Memo to Employees & Managers
6/26
• Documents Available on PantherSoft
6/27 + 6/29
• PEP Webinar

July

7/12
• Performance Management Workshop
7/17
• Reminder to Employees with Incomplete PEPs
7/20
• Performance Management Workshop
7/28
• Employee Documents Should be Completed

August

8/8
• Performance Management Workshop
8/14
• Reminder to Managers with Incomplete PEPs
8/23
• Performance Management Workshop

September

9/8
• Manager Documents Should be Completed
9/30
• 2nd Level Approval
• Document Deadline
THE SYSTEM

PantherSoft HR: Online PEP
Myhr.fiu.edu
Myhr.fiu.edu
Employee Self Evaluation
Manager Evaluation

- Section 1 - Past Year's Goals & Achievements
- Section 2 - Competencies
- Section 3 - Overall Summary
- Section 4 - Goals for Next Year
- Section 6 - Employee Comments
Past Year’s Goals: Employee Document

**2016-2017 Goal #1**

**Employee Rating**: 3 - Fully Meets

**Employee Comments**

Employee can comment on the goal here.

**2016-2017 Goal #2**

**Status**

**Percent Complete**: 0

**Employee Comments**

Employee can comment on the goal here.

**Past Year’s Goals & Achievements Summary**

**Employee Comments**

Any new goals or accomplishments that the employee wishes to add would go here.
Past Year’s Goals: Manager Document
## Competencies

**Section 2 - Competencies**

Assess each Competency using the rating scale provided. Include comments and examples to support the ratings that exceed or fall short of expectations. A rating of "3 - Fully Meets" DOES NOT require comments.

### Job Knowledge

**Description:** Uses knowledge and expertise acquired through education, training, and experience; remains current in field and related technologies and practices; competently performs all duties in the position description.

<table>
<thead>
<tr>
<th>Employee Rating</th>
<th>Employee Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>3 - Fully Meets</strong></td>
<td>Enter comments here.</td>
</tr>
</tbody>
</table>

**Created By:** Template 08/22/2017 10:02AM

- Service Excellence
- Compliance and Accountability
- Communication and Interpersonal Skills
- Efficiency
Competencies: Manager Document

Section 2 - Competencies

Assess each Competency using the rating scale provided. Include comments and examples to support the ratings that exceed or fall short of expectations. A rating of "3 - Fully Meets" DOES NOT require comments.

Job Knowledge

Description: Uses knowledge and expertise acquired through education, training, and experience; remains current in field and related technologies and practices; competently performs all duties in the position description.

Manager Rating: 3 - Fully Meets

Manager Comments:

Writing Tools

Manager comment goes here.

Employee Rating: 3 - Fully Meets

Employee Comments:

Employee comment goes here.
### Overall Summary Calculation

#### Section 1 - Past Year’s Goals & Achievements

- **2015-2016 Goals**
- **2016-2017 Goals**

<table>
<thead>
<tr>
<th>Past Year’s Goals &amp; Achievements Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager Rating</td>
</tr>
<tr>
<td>3.00 (NA)</td>
</tr>
<tr>
<td>Employee Comments</td>
</tr>
</tbody>
</table>

#### Section 2 - Competencies

Assess each Competency using the rating scale provided. Include comments and examples to support the ratings that exceed or fall short of expectations. A rating of “3 - Fully Meets” DOES NOT require comments.

- **Expand** | **Collapse**

<table>
<thead>
<tr>
<th>Job Knowledge</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Service Excellence</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Compliance and Accountability</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Communication and Interpersonal Skills</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Efficiency</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Competencies Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager Rating</td>
</tr>
<tr>
<td>3 - Fully Meets</td>
</tr>
<tr>
<td>3.40</td>
</tr>
</tbody>
</table>
Overall Summary

Section 3 - Overall Summary

TIP: Note that the Overall Rating is calculated based on goals and competencies ratings. To change the summary rating, use the Override link, then substantiate the change in the Manager Comments.
Goals for Next Year: Employee Document

Assessment and Planning
Self-Evaluation

Section 3 - Goals for Next Year

Goal setting is the key to managing the work done in your Department. When an employee has completed the self-review, the employee-suggested goals will be visible for reference to the manager. The manager is responsible for setting and entering final goals.

TIP: Add each goal as an individual action item, with criteria for its completion and a target date.
Goals for Next Year: Manager Document

Section 4 - Goals for Next Year

Goal setting is the key to managing the work done in your Department. When an employee has completed the self-review, the employee-suggested goals will be visible for reference to the manager. The manager is responsible for setting and entering final goals.

TIP: Add each goal as an individual action item, with criteria for its completion and a target date.

Expand | Collapse

### 2017-2018 Goal 1

### 2017-2018 Goal 2

Goals for Next Year - Employee Self Evaluation

**Employee Comments**

**Goal 1** – Employee enters goal here
- Specific
- Measureable

**Goal 2** – Employee can enter as many goals as they want
### Attachments

<table>
<thead>
<tr>
<th>File Name</th>
<th>Description</th>
<th>Attachment Audience</th>
<th>Last Update Date/Time</th>
<th>Uploaded By</th>
</tr>
</thead>
<tbody>
<tr>
<td>PDF_Document.pdf</td>
<td>Course Certificate</td>
<td>Employee and Manage</td>
<td>06/23/2017 11:55:17AM</td>
<td>Kathryn Lopez</td>
</tr>
<tr>
<td>Word_Document.docx</td>
<td>Recognition Letter</td>
<td>Employee and Manage</td>
<td>06/23/2017 11:55:10AM</td>
<td>Kathryn Lopez</td>
</tr>
<tr>
<td>Image.jpg</td>
<td></td>
<td>Employee and Manage</td>
<td>06/23/2017 11:55:02AM</td>
<td>Kathryn Lopez</td>
</tr>
</tbody>
</table>

Add Attachment

[Images of file types]
Email Notifications

Email Notifications Will Guide Next Steps and Show Status

This automatic notification is to alert you that PEP documents for the period between 07/01/2016 and 06/30/2017 are now open to begin evaluating employees. (Note: any current or historical documents can also be viewed on a split screen while writing an evaluation by clicking on the "Related Content" link.)

Select this link to access current documents:
https://myhr.fiu.edu/psp/hrms_c/ROLE_MANAGER.EMP_CURRENT_MY_PRF.GBL

PEP documents are now available for the following employees:
Jaede Berereton (1589355)

Below is this document’s status: [X] = Completed Steps; [O] = Next PEP Action Step

[O] Start
[ ] Share with Employee
[ ] Enter Review Date/Request Acknowledgment
[ ] Employee Acknowledge
[ ] Submit for Approval
[ ] 2nd Level Approve

If you have any questions or require assistance, please contact HR Customer Service at 305-348-2181.
Workflow

Employee Completes Self-Evaluation → Supervisor Writes Manager Evaluation → Supervisor & 2nd Level Discussion

Request Acknowledgement → Hold Performance Review → Supervisor Shares with Employee

Employee Acknowledges → Manager Submits for Approval → 2nd Level Approves
Manager: Review Date
Employee Actions

- Enter Comments
- Acknowledge Review
Submit for Approval
Approve Document

Approve or deny the proposed information for the employee listed here. You may also enter optional comments about each approval choice. When you are finished, select the Approve or Deny button on the page.

Kathryn Lopez

Empl ID 000000

Performance Document

Doc Type: Assessment and Planning
Author: Eran Abel
Period Begin Date: 07/01/2016  
Period End Date: 06/30/2017
Rating: 3 - Fully Meets

Performance Document Details

Approve Performance Document

:Pending

Pending

Submit mango PJ

Second Level Approver

Comment

Approve  Deny
### Performance Document History

Listed here are the completed and canceled documents for which you are the Manager. You can access a document by selecting the “Employee” hyperlink.

<table>
<thead>
<tr>
<th>Performance Documents</th>
<th>Personalize</th>
<th>Find</th>
<th>First</th>
<th>1 of 1</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employee ID</strong></td>
<td><strong>Name</strong></td>
<td><strong>Document Type</strong></td>
<td><strong>Document Status</strong></td>
<td><strong>Period Begin</strong></td>
<td><strong>Period End</strong></td>
</tr>
<tr>
<td>0000000</td>
<td>Kathryn Lopez</td>
<td>Assessment and Planning</td>
<td>Completed</td>
<td>07/01/2016</td>
<td>06/30/2017</td>
</tr>
</tbody>
</table>
RESOURCES AND TRAINING
PEP Toolkit

hr.fiu.edu

• Step-by-Step Instructions for:
  o Employees
  o Managers
  o 2nd Level Managers
• PEP Definitions
  (ratings and competencies)
• Goal Setting Template
• How to Clear Cache Instructions
• Webinar Recording/Slides
• Preparation Document Template
Training

Computer Labs by Department Request
• July – August
• Hands on system assistance

Online Performance Management Courses
• June – September
• FIU.Skillport.com
  Login=Panther ID Password=welcome

Performance Management Workshops
• July – September
• Register at: profdev.fiu.edu
2016-17 Review Cycle

• PEP Documents LIVE – June 26th
• Submission Deadline – September 30th
Getting Credit for Attending Today

• Go to: go.fiu.edu/PEP20162017Webinar
• Complete PEP 2016-17 Webinar Survey
• Include your My Accounts Username
We Are Here for You!

- Human Resources Service Center – 305-348-2181
- Talent Acquisition and Management – 305-348-3206 or by email at TAM@fiu.edu
- Hr.fiu.edu
THANK YOU!