



Performance Management – Professional Staff

Professional Staff evaluations are conducted during four different review cycles in a given year. The time in which a Professional Staff member becomes eligible for review is determined by:

- The date that they started in a Professional Staff position; and
- The length of time they have remained in that position.

All Professional Staff are evaluated using this process annually for the first 5 years then move into a 3 year cycle.

Note- As per AFT contract, individuals currently serving in a 4 or 5 year contract will eventually move to a 3 year evaluation cycle.

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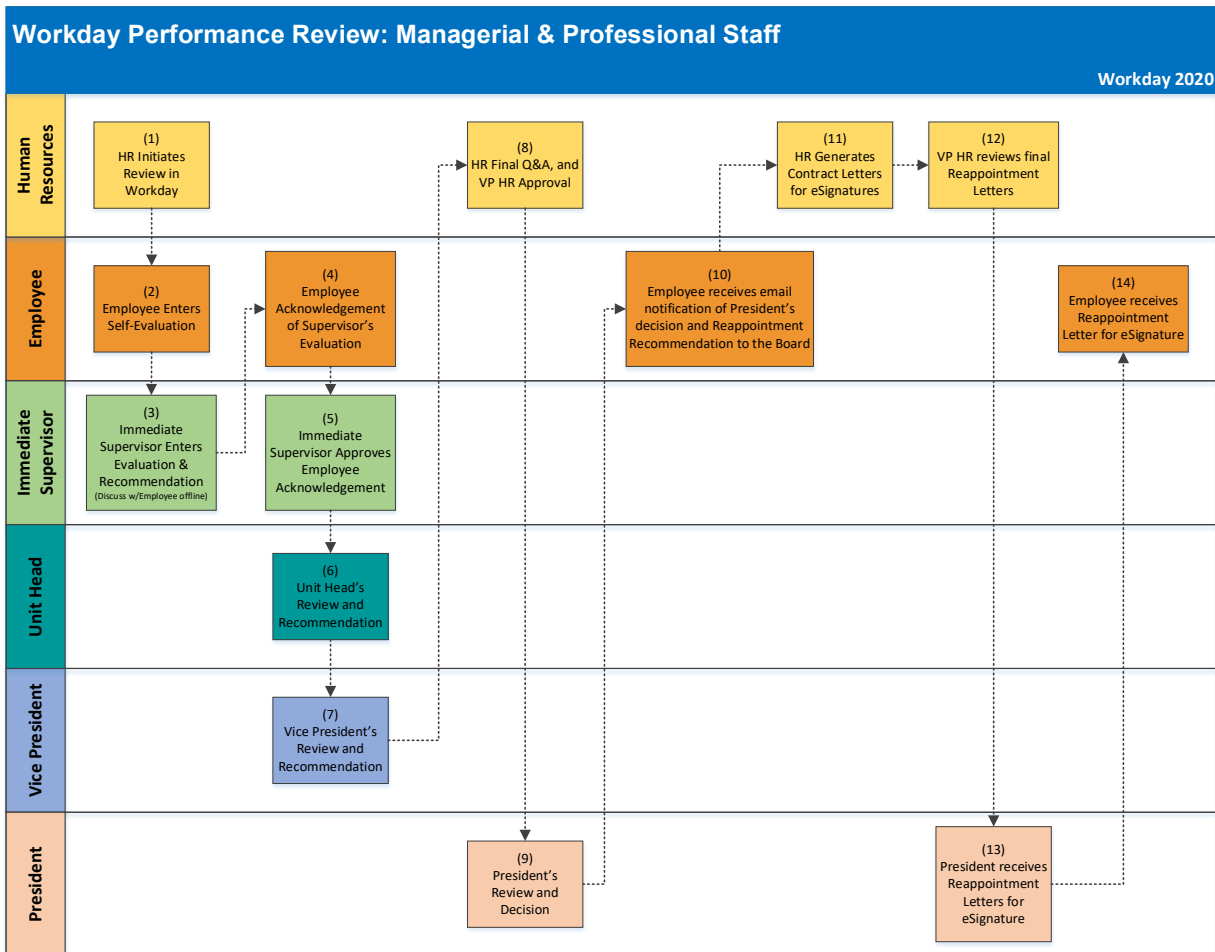
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Before You Begin

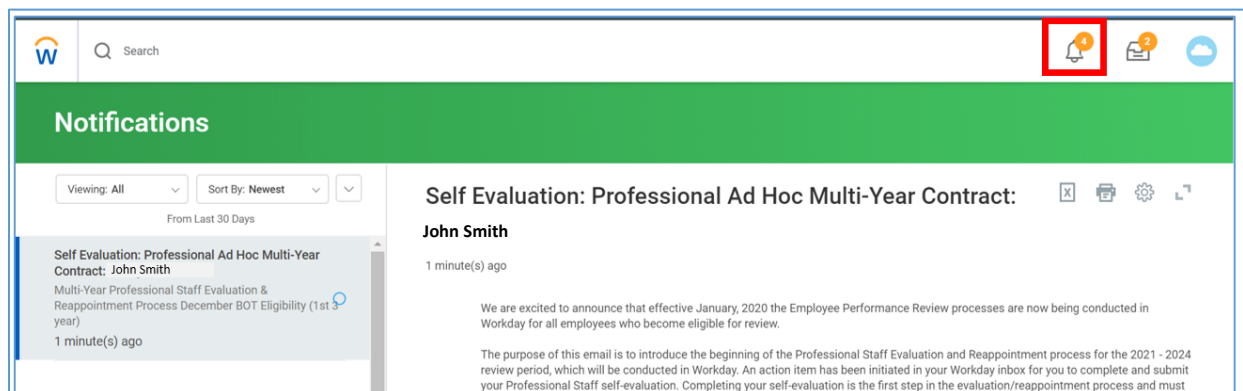
Human Resources initiates the Performance Review and the Employee will receive an email and a Workday notification alerting them that the review process is starting. The

email will contain information about the review process and a link to the performance review timeline/schedule (this can also be found on the Human Resources website). Employee will login to Workday and click on the Workday Inbox in the top right corner of the landing page. Then, click the task in the Inbox labeled “Professional Self-Evaluation”.

Performance Review Process

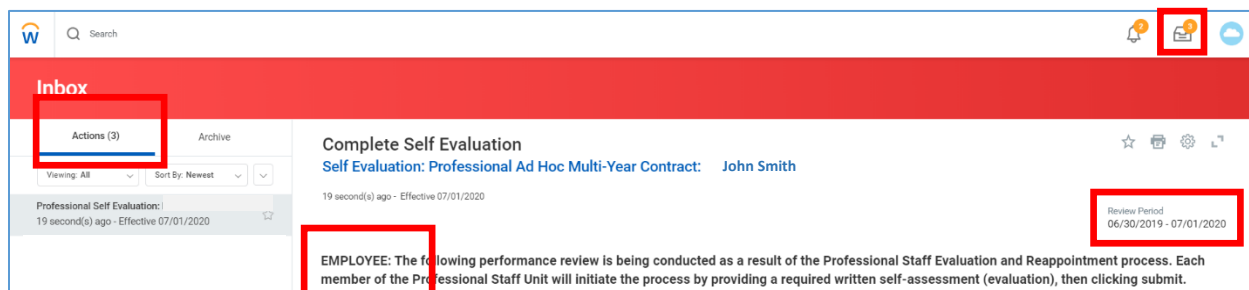


Employee Receives Email and Notification of Review Process

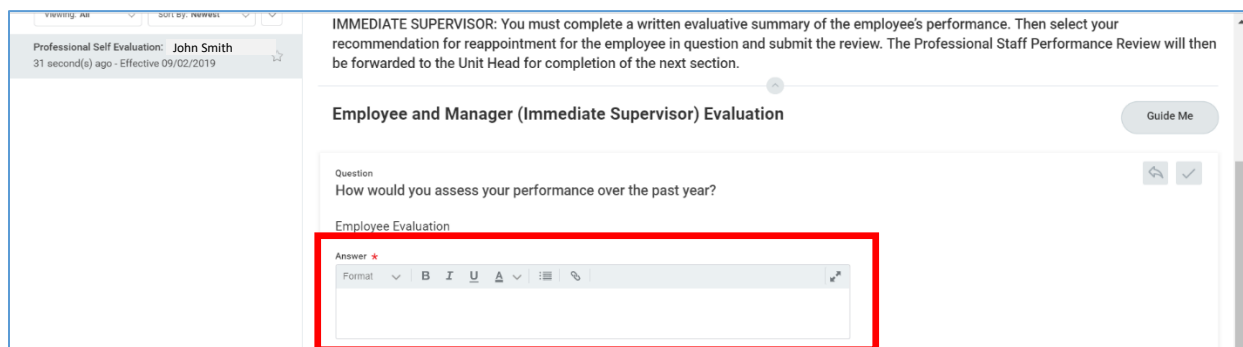


Employee Completes Self-Evaluation

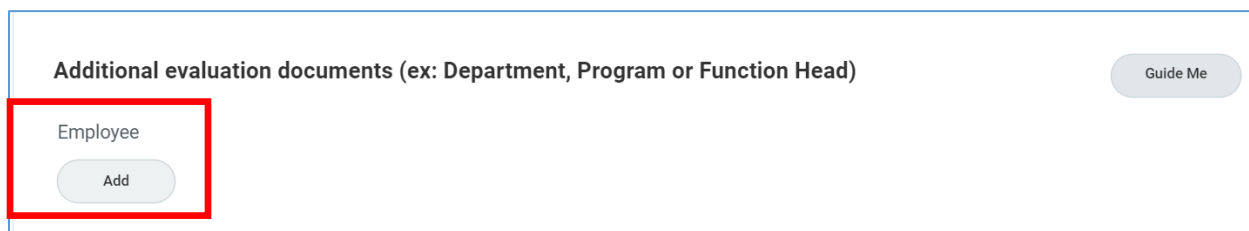
- 1) Login to Workday and click on the Inbox in the top right corner.
- 2) Click the **Professional Self Evaluation** task under **Actions**.
- 3) At the top of the page, review the **Review Period** which contains the period being reviewed, and the Help text "**EMPLOYEE**" paragraph which contains instructions and due date for completing the evaluation.



- 4) In the **Employee and Manager (Immediate Supervisor) Evaluation** section, enter your Answer to the question: **How would you assess your performance over the past year?** by clicking directly in the text box and entering your comments. (You can also cut and paste information into the box).



- 5) In the **Additional evaluation documents** section, you may include attachments to support your self-evaluation by clicking **Add**. For example; Department, Program, Function Head evaluation, letters of acknowledgement, samples of work, etc.



- 6) Enter any comments you may have in the **Comment** section.

Additional evaluation documents (ex: Department, Program or Function Head)

Employee

Evaluation Supporting Document
(empty)

File

Attach

Updated By
(empty)

Upload Date
(empty)

Comment

The remaining sections are *read-only* for the employee, and provide visibility into the next steps in the review process:

- Immediate Supervisor Reappointment Recommendation
- Unit Head Reappointment Recommendation
- Vice President Reappointment Recommendation

Immediate Supervisor Reappointment Recommendation

Question
Do you recommend reappointment?

Unit Head Reappointment Recommendation

Question
Do you recommend reappointment?

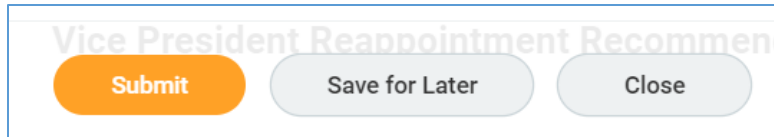
Vice President Reappointment Recommendation

Question
Do you recommend reappointment?

7) Click **Submit** when done.

Save for Later

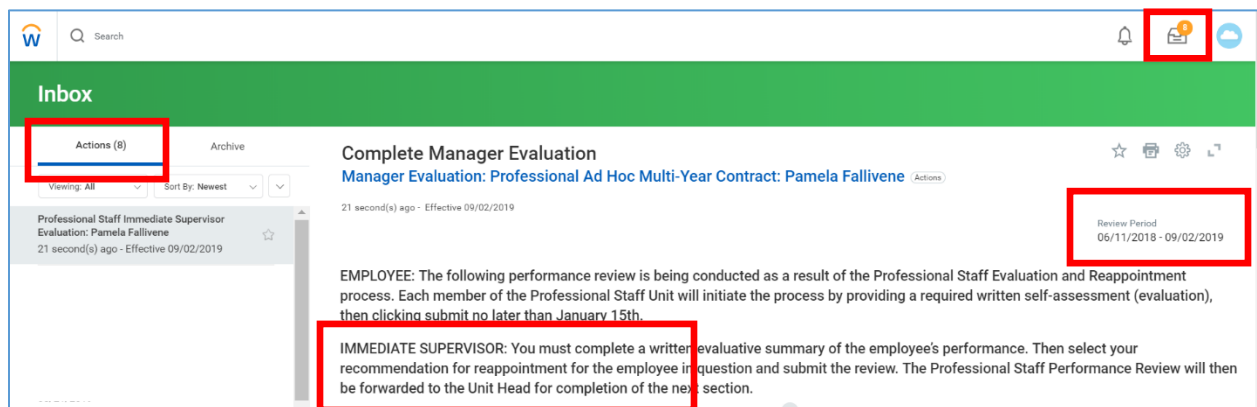
- 1) Click the **Save for Later** button to save your request and return to it later.
- 2) Navigate to the **Inbox** and click the **Actions** tab to locate and open the saved request and continue to work on it.



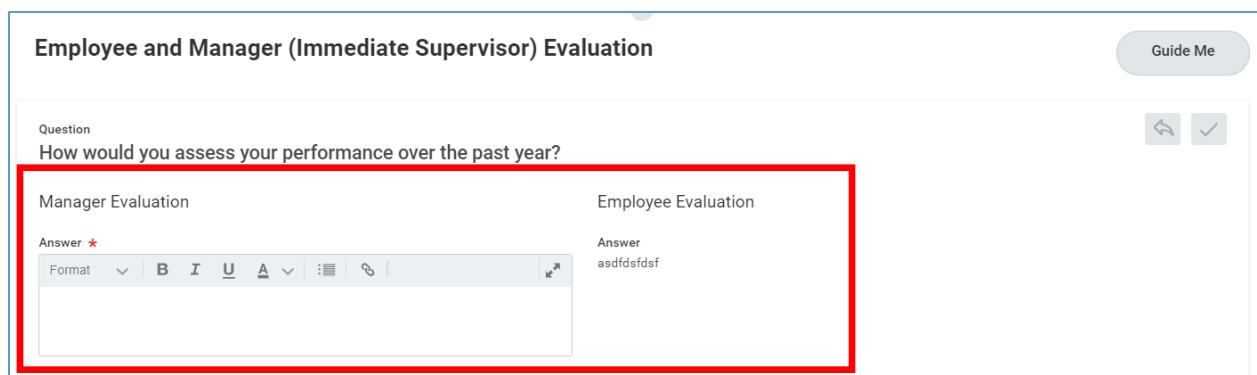
Immediate Supervisor's Evaluation and Recommendation

Upon initiation of the review process, the Immediate Supervisor will receive an alert with details regarding the review period including a list of employees who are impacted by this review. Once submitted by the Employee, the Supervisor receives a notification regarding the evaluation.

- 1) Login to Workday and click on the Inbox in the top right corner.
- 2) Click the **Professional Staff Immediate Supervisor Evaluation** task under **Actions**.
- 3) At the top of the page, review the **Review Period**, which contains the period being reviewed, and the Help text "**IMMEDIATE SUPERVISOR**" paragraph which contains instructions for completing the evaluation.



- 4) In the **Employee and Manager (Immediate Supervisor) Evaluation** section, review the employee's self-assessment in the **Employee Evaluation** section. You can also click to review employee's attachments, if any.
- 5) Under **Manager Evaluation**, click in the **Answer** field and enter your required written assessment of the employee. (You can also cut and paste information into the box).



- 6) In the **Additional evaluation documents** section, you may include attachments to support your evaluation by clicking **Add**.

Additional evaluation documents (ex: Department, Program or Function Head) Guide Me

Manager

Add

- 7) Enter any comments you have in the **Comment** section.

Additional evaluation documents (ex: Department, Program or Function Head) Guide Me

Manager

Evaluation Supporting Document (empty) ↶ ✓

File

Attach

Updated By (empty)

Upload Date (empty)

Comment

- 8) In the **Immediate Supervisor Reappointment Recommendation** section, respond to the Question: **Do you recommend reappointment?** by clicking in the **Rating** field, and select from the following:

- **Recommended**
(For purposes of an AFT member providing an immediate supervisor evaluation of another AFT member the 'recommended' represents a satisfactory evaluation.)
- **Not Recommended**
(For purposes of an AFT member providing an immediate supervisor evaluation of another AFT member the 'not recommended' represents an unsatisfactory evaluation.)

Question ↶ ✓

Do you recommend reappointment?

For purposes of an AFT member providing an immediate supervisor evaluation of another AFT member, the immediate supervisor will use "Recommended" (below) to designate a satisfactory evaluation or "Not Recommended" (below) to designate an unsatisfactory evaluation.

Manager Evaluation

Rating *

select one

select one

Recommended

Not Recommended

mmendation

Guide Me

The next section must be completed by the Unit Head only. If an entry is made inadvertently by someone other than the Unit Head, an error message will display, and the entry will have to be deleted before submitting.

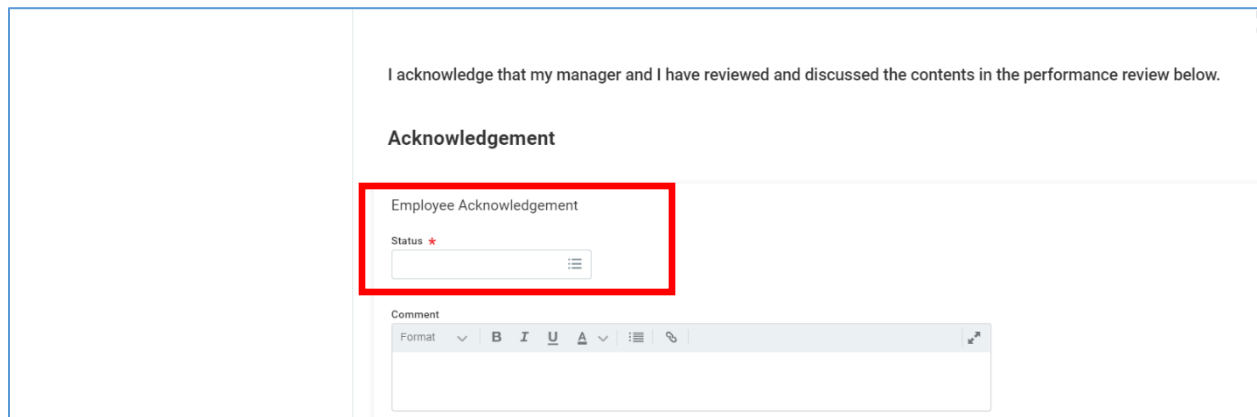
9) Click **Submit** or **Save for Later**.

The employee will receive the **Employee Performance Review Acknowledgement** task in their Workday Inbox.

Note: Immediate Supervisor should meet with the employee to discuss the evaluation before submitting.

Employee Acknowledgment

- 1) Login to Workday and click on the Inbox in the top right corner.
- 2) Click the **Employee Performance Review Acknowledgement** task under **Actions**.
- 3) Review the Immediate Supervisor's Written Evaluation, Additional evaluation documents (if any), and Reappointment Recommendation.
- 4) Enter your **Acknowledgement** at the top of the page by clicking **Status**, and selecting from the following:
 - I acknowledge with comments (enter any comments into the field below).
 - I acknowledge without comments.



I acknowledge that my manager and I have reviewed and discussed the contents in the performance review below.

Acknowledgement

Employee Acknowledgement

Status *

Comment

Format B I U A | | |

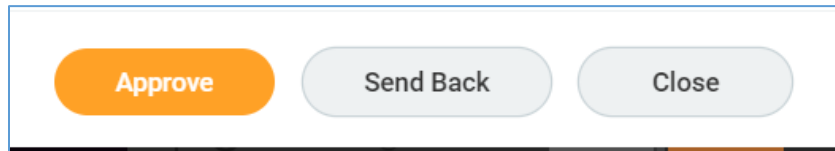
5) Click **Submit**.

The Immediate Supervisor will receive the **Manager Evaluation: Professional Staff Contract** task in their Workday Inbox.

Immediate Supervisor Review of Acknowledgement

- 1) Login to Workday and click on the Inbox in the top right corner.
- 2) Click the **Manager Evaluation: Professional Staff Contract** task in your Workday Inbox under **Actions**.
- 3) Review Employee Acknowledgement status, and comments provided, if any.

Note: Immediate Supervisor may respond to the employee's comments by clicking **Send Back** to return the item for the employee's review, or move it forward by clicking **Approve**.



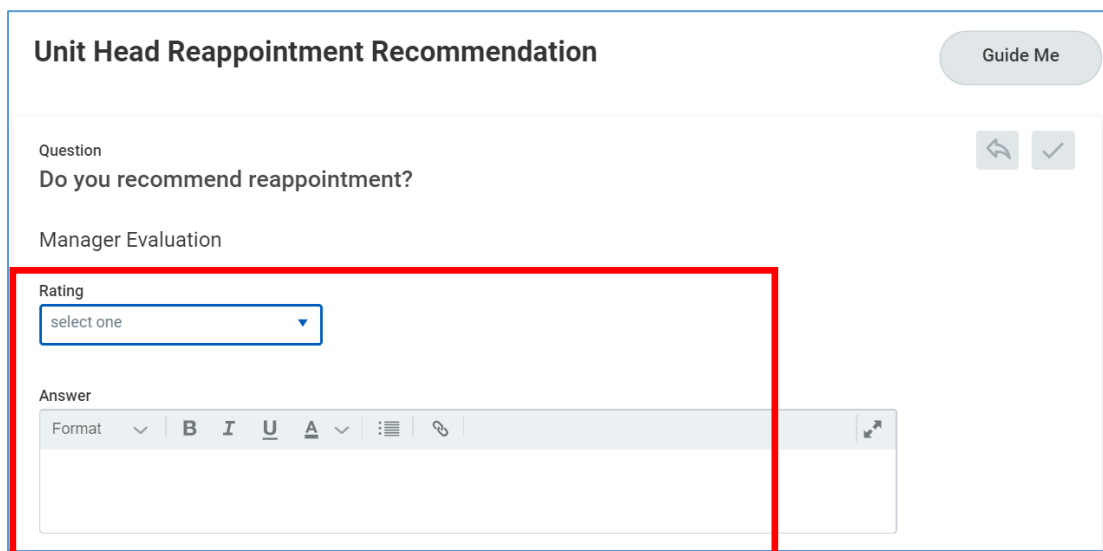
- 4) Click **Approve**.

The review will be routed to the Unit Head for review and recommendation.

Note: If the Immediate Supervisor is also a Unit Head, the Unit Head approval step will be skipped and the Vice President will receive a **Vice President's Recommendation for Professional Performance Review** task in their Workday Inbox.

Unit Head Recommendation

- 1) Login to Workday and click on the Inbox in the top right corner.
- 2) Click the **Unit Head's Recommendation for Professional Performance Review** task under **Actions**.
- 3) Review the Employee Acknowledgement, the Immediate Supervisor's and Employee's Written Evaluations, Additional evaluation documents (if any), and Reappointment Recommendation.
- 4) In the **Unit Head Reappointment Recommendation** section, respond to the Question: **Do you recommend reappointment?** by clicking in the **Rating** field, and select from the following:
 - Recommended
 - Not Recommended
- 5) In the **Answer** field, enter your required written assessment. (You can also cut and paste information into the box).

A screenshot of a web form titled 'Unit Head Reappointment Recommendation'. The form has a 'Guide Me' button in the top right. Below the title, there is a 'Question' section with the text 'Do you recommend reappointment?' and two icons (a left arrow and a checkmark). Below this is a 'Manager Evaluation' section. The 'Rating' field is a dropdown menu with 'select one' and a downward arrow, highlighted with a red box. Below the 'Rating' field is the 'Answer' field, which has a rich text editor toolbar with options for Format, Bold (B), Italic (I), Underline (U), Text Color (A), and List, followed by a large text area for the answer.

Note: If the Unit Head is also the Vice President, the Vice President's approval step will be skipped and Human Resources will receive the evaluation in their Workday Inbox.

Vice President Recommendation

- 1) Login to Workday and click on the Inbox in the top right corner.
- 2) Click the **Vice President's Recommendation for Professional Performance Review** task under **Actions**.
- 3) Review the Employee Acknowledgement, the Immediate Supervisor's and Employee's Written Evaluations, Additional evaluation documents (if any), and Reappointment Recommendation.
- 4) In the **Vice President Reappointment Recommendation** section, respond to the Question: **Do you recommend reappointment?** by clicking in the **Rating** field, and select from the following:
 - Recommended
 - Not Recommended
- 5) In the **Answer** field, enter your required written assessment. (You can also cut and paste information into the box).

- 6) Click **Add** under **Additional evaluation documents** and then click **Attach** to upload any supporting evaluation documents, if applicable.

Additional evaluation documents (ex: Department, Program or Function)
Guide Me

Manager

Evaluation Supporting Document
(empty)

File

Attach

Updated By
(empty)

7) Click **Approve**.

Vice President Acknowledgement

After Reappointment Recommendation, the Vice President will receive a *Performance Review Printout* task in their Workday Inbox to acknowledge that a copy of the performance review will be available to the employee in Workday.

- 1) Click on the Workday Inbox in the top right corner.
- 2) Click the **Manager Evaluation: Professional Ad Hoc Multi-Year Contract** task under **Actions**.
- 3) Click the **I Agree** checkbox.
- 4) Enter any comments in the **Comment** field, if applicable.
- 5) Click **Submit**.

Inbox

Actions (2)
Archive

Viewing: All
Sort By: Newest

Manager Evaluation: Annual Managerial Performance Evaluation: Frank N. Stein
16 minute(s) ago - Effective 08/01/2020

Manager Evaluation: Professional Ad Hoc Multi-Year Contract: Rita Book
1 hour(s) ago - Effective 01/01/2020

Performance Review Printout
Review Documents for Manager Evaluation: Annual Managerial Performance Evaluation: Frank N. Stein

16 minute(s) ago - Effective 08/01/2020

Documents

Document
Performance Review Printout 2019-11-21 14_37 EST.pdf

Signature Statement
I acknowledge that a copy of this performance review will be made available to the employee in Workday once I click submit.

I Agree
☒

Comment

Submit
Save for Later
Cancel

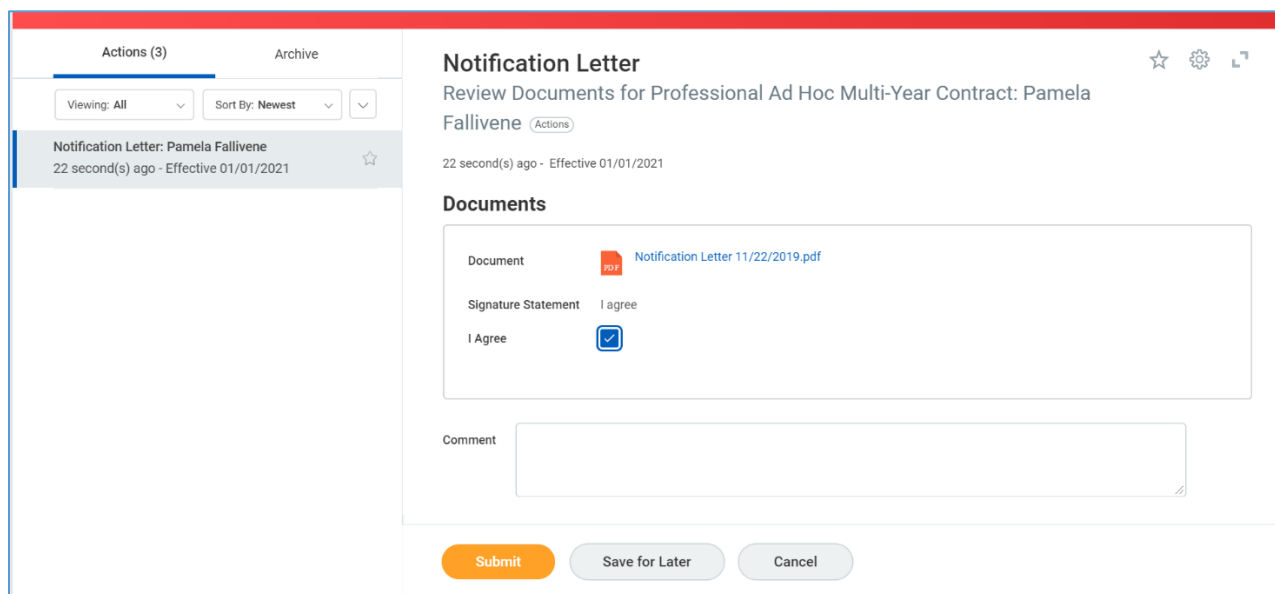
The review will then be routed in Workday through the following approval process:

- Human Resources
- President

Employee Receives Notification Letter

After President's approval, the employee will receive a Notification Letter in their Workday Inbox.

- 1) Click on the Inbox in the top right corner.
- 2) Click the **Notification Letter** task under **Actions**.
- 3) Click the **I Agree** checkbox.
- 4) Enter any comments in the **Comment** field, if applicable.
- 5) Click **Submit**.

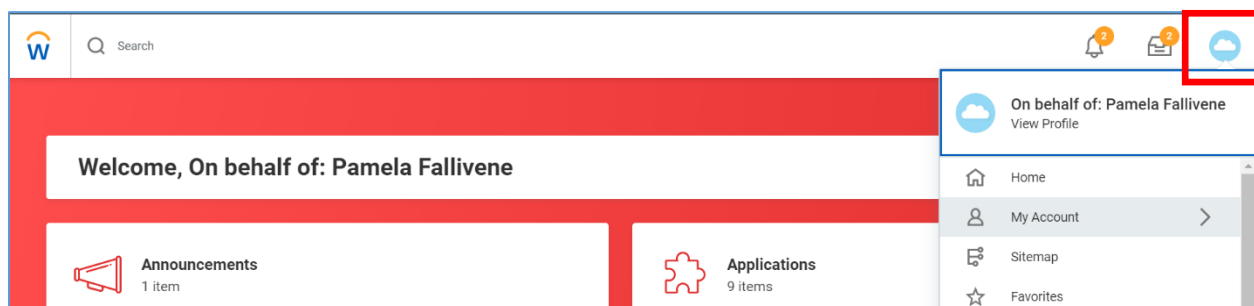


The screenshot shows the Workday interface for a Notification Letter. On the left, there's a sidebar with 'Actions (3)' and 'Archive' tabs. Under 'Actions', a notification for 'Notification Letter: Pamela Fallivene' is listed, dated '22 second(s) ago - Effective 01/01/2021'. The main content area is titled 'Notification Letter' and 'Review Documents for Professional Ad Hoc Multi-Year Contract: Pamela Fallivene'. It shows a document 'Notification Letter 11/22/2019.pdf' with a 'Signature Statement' section containing 'I agree' and an 'I Agree' checkbox that is checked. Below this is a 'Comment' field. At the bottom, there are three buttons: 'Submit' (orange), 'Save for Later' (grey), and 'Cancel' (grey).

Employee Receives Copy of Performance Review

Employee can access a copy of their Performance Review after Vice President Acknowledge task in their Workday Profile.

- 1) Click the cloud icon in the top right corner of Workday.
- 2) Click **View Profile**.



- 3) Click **Personal** in the left menu.
- 4) Click on the **Documents** tab.

A copy of the Performance Review and Notification Letter can be found under **Reviewed Documents**.

After performance reappointment recommendations have been approved by the Board of Trustees, the employee will receive a copy of the Contract Letter in their Workday Inbox for electronic signature via DocuSign.

Employee DocuSigns Contract Letter

- 1) Click the **Annual Managerial Performance Evaluation** task in your Workday Inbox.
- 2) Click **eSign by DocuSign**.
- 3) Click the checkbox **“I agree to use electronic records and signatures.”**
- 4) Click **Continue**.
- 5) Review the letter, including comments from the President.
- 6) Click **Sign**.
- 7) Click **Finish**.
- 8) Enter **Comments**, if any.
- 9) Click **Submit**.