Performance Management Manager

cornerstone

William & Mary
CHARTERED 1693
• Introduction to Cornerstone Performance Evaluation
• Timeline
• Access Cornerstone
• Let’s get started! - Manager Completion
• Questions?
INTRODUCTION
Performance Management Cycle*

*May 1, 2016 - April 30, 2017

1. Performance Planning
   setting performance goals and objectives as well as career development goals

2. Coaching & Providing Feedback
   monitoring employee progress, providing constructive feedback and evaluating performance

3. Completing the Evaluation

This year’s evaluation is exactly the same as the previous year but it will be completed online (instead of completing it on paper)

Performance Planning and Evaluations Policy for PPFs:
http://www.wm.edu/offices/compliance/policies/professional_faculty/ppe_policy/index.php
Employee’s Role

The employee has an opportunity to self-evaluate the achievement level and the extent to which his/her performance met the annual goals.
Manager’s Role

1. The supervisor may provide the employee with an opportunity to complete a self-assessment based on his or her performance plan.

2. The supervisor prepares the evaluation, rating the employee’s achievement level.

3. The evaluation must:
   • rate the employee’s proficiency in the basic competencies;
   • rate the employee’s achievement of the annual goals and/or job objectives.

4. The supervisor will provide the performance evaluation documentation to the reviewer for review and approval.
Reviewer’s Role

1. The reviewer is responsible for ensuring consistent and appropriate application of the evaluation process.

2. The reviewer views the completed evaluation and signs-off.

3. There is a text box in the *Signature Page* where the reviewer can add optional comments visible to the employee and the manager.
Suggested Timeline

• Self-Assessment 4/24 - 5/5

• Manager Completion 5/8 - 5/19

• Reviewer Approval 5/22 - 5/26

• Discussion and Sign-off 5/29 - 6/2
Evaluation Step Progression

1. Self Assessment
2. Manager Completion
   - Due: 4/17/2017
3. Reviewer
4. Employee Review Prior to Discussion
   - Manager for Discussion
5. Employee Sign-Off

Get Started
Evaluation Sections

1. Overview: instructions
2. Core Competencies
3. Supervisor Competencies
4. Employee Comments
5. Core Job Responsibilities & Goal Achievement - manager only
6. Summary page: ratings
7. Signatures:
   - the reviewer signs first
   - second, the manager (after the discussion)
   - third, the employee (after the discussion)
Click the question mark for a description of the ratings.
Communications

The employee will get an email that will come from: askHR@wm.edu asking to complete self-assessment (optional)

When the self-assessment is completed the employee submits it to the manager.
The manager will get an email from askHR@wm.edu when the evaluation is submitted by the employee.

(or by a certain pre-determined date from askHR@wm.edu stating that there is an evaluation ready to be completed)

Once the evaluation is done, the manager submits it to the reviewer.
The reviewer will get an email from askHR@wm.edu when the manager submits the evaluation.

The reviewer will sign and submit the evaluation to both the employee and the manager to view prior to the discussion.

Comments addressed to the employee and/or the manager can be entered on the signature page.

NOTE:
If you need to ask the manager to add, delete or change a rating or comments please send an email to askhr@wm.edu requesting that the evaluation be re-opened to the manager.
Both, the **manager and the employee** will get an email from **askHR@wm.edu** when the reviewer submits the evaluation.

The manager and the employee may review the performance evaluation **prior** to scheduling the discussion.
The **manager** will schedule a time with the employee to discuss and review the performance evaluation.

The **manager and the employee** will get together to go over the performance evaluation.

The manager will sign-off **after** the discussion takes place and will submit the evaluation to the employee.
Once the manager signs and submits the evaluation, the employee can go directly into Cornerstone to sign.

(or, the employee will receive an email from askHR@wm.edu when the manager submits the evaluation)

| The employee can now sign off. |
Accessing Cornerstone

Go to:
Cornerstone.wm.edu
Log-in using your W&M network credentials
Click on My Tasks to access the evaluation
your task

Professional and Professional Faculty evaluation for EMPLOYEE’S NAME
...what if you can’t see your tasks?

Where are my tasks??
Click on the *Show completed and expired tasks* button.
Your task(s) will show up here:

Professional and Professional Faculty evaluation for EMPLOYEE'S NAME
Quick notes

• The system will log out users after four (4) hours of being idle.

• The employee, manager and reviewer can not be in the system at the same time completing the same evaluation.

• Items marked with an * are required.

• If two people are working on the evaluation on the same computer, please open two different browsers.
Let's Get Started!
MANAGER COMPLETION
Overview

Performance Evaluation for Professionals & Professional Faculty

The performance evaluation should reflect the performance during the entire performance year of May 1, 2016 through April 30, 2017.

**Employee:** Complete the self-assessment of your job performance during the performance year for your supervisor to consider.

**Supervisors:** Review all documentation from the performance year including notes, interim evaluations and any memoranda or other documentation related to the employee's performance or behavior.

**Reviewer:** The reviewer should review and approve the evaluation before the manager and the employee meet to discuss it. The reviewer may consult with the supervisor to clarify any questions about the evaluation.

To get started completing the review, scroll down to the bottom of the screen and click the Get Started button.

Please complete the performance evaluation for a professional or professional faculty member.

The sections of the evaluation include:
- Core Competencies
- Supervisor Competencies
- Core Job Responsibilities & Goal Achievement

[Review Step Progression Diagram]
NOTE:
If the employee did not complete the self-assessment you will not see his/hers ratings and comments.
When this section is completed, click on Save and Continue.
NOTES:

If the employee selected all available Supervisor Competencies in the Self Assessment, you can rate and comment on them here: ① ②

If the employee did not select any Supervisor Competencies you will be able to add them in this section (instructions on the next slides)

If the employee did not select all available Supervisor Competencies you will be able to add more in this section (instructions on the next slides)

If the employee does not have supervisory responsibilities, choose Not Applicable from the drop menu

Employee’s rating and comments
Click on Select Competencies to add Supervisory Competencies

These competencies are vital to the success of all individuals who supervise staff and/or students. Rate the performance with respect to the supervisory competencies below:

- Coaching and Developing
- Managing Others

Comments in this section should be more detailed for ratings of Under-Performer or Exceptional Performer.

Note: If an employee does not have supervisory responsibility, choose Not Applicable from the drop down.

Coaching and Developing

Sets specific goals and job objectives and works with staff members to prioritize and revise goals
Motivates staff members to perform at the highest level
Provides support and guidance to employees
Identifies training and development opportunities
Guides employees to come up with solutions and learn from mistakes
Professional/Professional Faculty Supervisor

1. Select the Competencies

2. Click on Add

- Coaching and Developing
  - Sets specific goals and job objectives and works with staff members to prioritize and revise goals
  - Motivates staff members to perform at the highest level
  - Provides support and guidance to employees
  - Identifies training and development opportunities
  - Guides employees to come up with solutions and learn from mistakes

- Managing Others
  - Treats others fairly and with respect and dignity
  - Demonstrates strong, and thoughtful decision making
  - Performs well under pressure
  - Handles stressful situations in an appropriate manner
  - Is positive and creates a culture of inspiration
  - Holds employees accountable
  - Provides timely constructive and balanced feedback
  - Recognizes importance of the performance management process
  - Motivates subordinates and fosters teamwork
  - Works to resolve conflicts quickly, fairly and effectively
1. Select a rating

2. Enter your comments here

When this section is completed click on Save and Continue.
Supervisor Competencies

These competencies are vital to the success of all individuals who supervise staff and/or students. Rate the performance with respect to the supervisory competencies below:

- Coaching and Developing
- Managing Others

Comments in this section should be more detailed for ratings of Under-Performer or Exceptional Performer.

**Note:** If an employee does not have supervisory responsibility, choose Not Applicable from the drop down.

When this section is completed click on Save and Continue.
Employee's information here

You will see comments from the employee here

Click on Save and Continue
The 2015-16 performance plan and/or the position description can be used as a reference to identify the primary and essential duties here (copy/paste)

NOTES:

Only three (3) Core Job Responsibilities are required.

You can add an additional three Core Job Responsibilities (optional)
When this section is completed click on Save and Continue
**Employee's information here**

### Summary

<table>
<thead>
<tr>
<th>Overall Rating</th>
<th>Solid Performer</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Manager Completion</strong></td>
<td></td>
</tr>
<tr>
<td>Professional Core Competencies</td>
<td>3.5/5.0 Advanced Performer</td>
</tr>
<tr>
<td>Supervisor Competencies</td>
<td>3.0/5.0 Solid Performer</td>
</tr>
<tr>
<td>Employee Comments</td>
<td>N/A</td>
</tr>
<tr>
<td>Core Job Responsibilities</td>
<td>3.3/5.0 Satisfactory/Solid Performer</td>
</tr>
<tr>
<td><strong>Overall</strong></td>
<td>3.3/5.0 Solid Performer</td>
</tr>
</tbody>
</table>

**Click on Submit**
Submit Review

You will not be able to modify once you have submitted. Are you sure that you want to submit now?

Click on Submit again to confirm
Employee's information here

You can print the performance evaluation

Congratulations, you have successfully completed this step.

If you have no other evaluations/actions to complete, you may log out by clicking on the "gear" icon in the top right.

Managers and Reviewers - If you have other evaluations/actions to complete, please click on the "Go to Action Items" button below.

Go to Action Items
Performance Evaluation for Professionals & Professional Faculty

Congratulations, you have successfully completed this step.

If you have no other evaluations/actions to complete, you may log out by clicking on the "gear" icon in the top right.

Managers and Reviewers - If you have other evaluations/actions to complete, please click on the "Go to Action Items" button below.
Performance Evaluation for Professional & Professional Faculty

Congratulations, you have successfully completed this step.

If you have no other evaluations/actions to complete, you may log out by clicking on the "gear" icon in the top right.

Managers and Reviewers - If you have other evaluations/actions to complete, please click on the "Go to Action Items" button below.

Go to Action Items

Employee’s information here
click on the “gear”
What happens next?

1. The reviewer will view, sign and submit the evaluation back to you and the employee.
2. Both, you and the employee can view the evaluation prior to the discussion.
3. You will schedule a meeting with the employee.
4. You and the employee will review and discuss the evaluation.
5. You will sign off after the discussion takes place.
6. The employee will sign off after you have submitted the evaluation for the final signature and any additional comments the employee may have (note: employee may decline to sign).
Questions?

We are here to help!
You can submit your questions to: askHR@wm.edu