Performance Management
Self-Assessment
• Introduction to Cornerstone Performance Evaluation
• Timeline
• Access Cornerstone
• Let’s get started! - Self Assessment
• 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**
   *Due: 4/3/2017*

2. **Manager Completion**

3. **Reviewer**

4. **Employee Review Prior to Discussion**

5. **Employee Sign-Off**

6. **Manager for Discussion**
1. Overview: instructions
2. Core Competencies
3. Supervisor Competencies
4. Employee Comments
5. Summary page: ratings
6. Core Job Responsibilities & Goal Achievement - manager only
7. Signatures:
   • reviewer signs first
   • second, the manager (after the discussion)
   • third, the employee (after the discussion)
Ratings

Click the question mark for a description of the ratings.

**Rating Scale**

<table>
<thead>
<tr>
<th>Rating</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Applicable</td>
<td>The employee's performance generally fails to meet the established expectations or requires frequent supervision and/or the redoing of work. The individual is not performing at the level expected for employees doing this type of work. Unacceptable job performance is due to the employee's lack of knowledge, skill or effort.</td>
</tr>
<tr>
<td>Under-Performer</td>
<td>The employee meets some of the job expectations, but not all. The individual requires support and direction to complete assignments. The employee generally performs at a minimum level and improvement is needed to fully meet expectations. This rating may be given to a new employee who has yet to learn or master a specific skill. In this latter case, the rating is a reflection of the employee's time in the position.</td>
</tr>
<tr>
<td>Developing Performer</td>
<td>The employees fully meet the established job expectations and is a</td>
</tr>
</tbody>
</table>

Choose Rating: Select
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 on Monday, May 8\textsuperscript{th} 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](mailto: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
Scheduled Tasks

Tasks

Title: 
Type: All Types

Show completed and expired tasks

Title

Professional and Professional Faculty evaluation for YOUR 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
Quick notes

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

• The employee, manager and reviewer cannot 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!
SELF ASSESSMENT
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**

1. **Self Assessment**
   - Due: 4/3/2017

2. **Manager Completion**

3. **Reviewer**

4. **Employee Review Prior to Discussion**

5. **Manager for Discussion**

6. **Employee Sign-Off**

Click Get Started
Professional Core Competencies

These core competencies are vital to the success of all professional members at W&M. Please rate the employee's performance with respect to each of the following:

- Accountability, Responsibility, and Dependability
- Communication
- Institutional Values
- Leadership
- Problem Solving/Decision Making
- Relationship Building

Instructions for completing this section:
1. Select an achievement level for each competency.
2. Add supporting comments for the achievement level selected in the comment box.
3. Comments should be more detailed for ratings of Under-Performer or Exceptional Performer.

Accountability, Responsibility, and Dependability

- Demonstrates initiative, takes ownership of job responsibilities
- Seeks input and acts upon feedback
- Enhances personal knowledge, skills and abilities
- Takes responsibility for and/or acknowledges errors
- Completes assignments and follows through on commitments and tasks

Communication
When this section is completed, click on Save and Continue.
Performance Evaluation for Professional & Professional Faculty

Employee's information here

Supervisor Competencies

Note: If an employee does not have supervisory responsibility, choose Not Applicable from the drop down.
Performance Evaluation for Professional & Professional Faculty

Employee’s information here

Supervisor Competencies

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.
Professional/Professional Faculty Supervisor

1 Select the Competencies

- **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

2 Click on Add
Select a rating

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.
Performance Evaluation for Professional & Professional Faculty

Employee's information here

Employee Comments

Comments, suggestions or information you would like considered in addition to your self assessment can be provided below.

1. Enter your comments here

2. If you want to see the Summary page click on Save and Continue, otherwise, go to step 3

3. When this section is completed, click on Submit
Performance Evaluation for Professional & Professional Faculty

Employee’s information here

Summary

<table>
<thead>
<tr>
<th>Manager Completion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professional Core Competencies</td>
</tr>
<tr>
<td>Supervisor Competencies</td>
</tr>
<tr>
<td>Employee Comments</td>
</tr>
<tr>
<td>Core Job Responsibilities</td>
</tr>
<tr>
<td>Overall</td>
</tr>
</tbody>
</table>

You will see your ratings here after the manager completes his/her sections

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
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
click on the “gear”
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
What happens next?

1. Your manager will access the performance evaluation, view your self-assessment and complete his/her sections.
2. The manager will submit the performance evaluation to the reviewer.
3. The reviewer will view, sign and submit the evaluation to you and your manager.
4. Both, you and your manager can view the evaluation prior to the discussion.
5. Your manager will schedule a meeting.
6. You and your manager will review and discuss the evaluation.
7. The manager signs off after the discussion takes place.
8. You will sign off after the manager submits the evaluation to you for the final signature and any additional comments you may have (note: employee may decline to sign).
Questions?

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