



Brandeis University

Preparing for the Midyear Performance Review
For Staff

Office of Human Resources
Workshop for Staff
Fall, 2023

Topic: TAP = Talent Advancement Program

Presented by Cynthia Farquhar

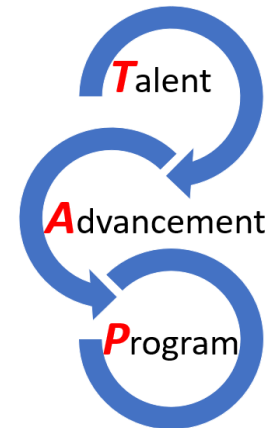
Introductions

Using the chat please share:

- Your name, title and department
- Goal(s) for today's session

Agenda

- ❑ What's *New!*
- ❑ TAP Program Overview
- ❑ Timeline & Performance Cycle
- ❑ Making the Most of Your Performance Review
- ❑ Using Workday for the Mid-Year Performance Review
- ❑ Q & A
- ❑ Resources



Ice Breaker Poll Question

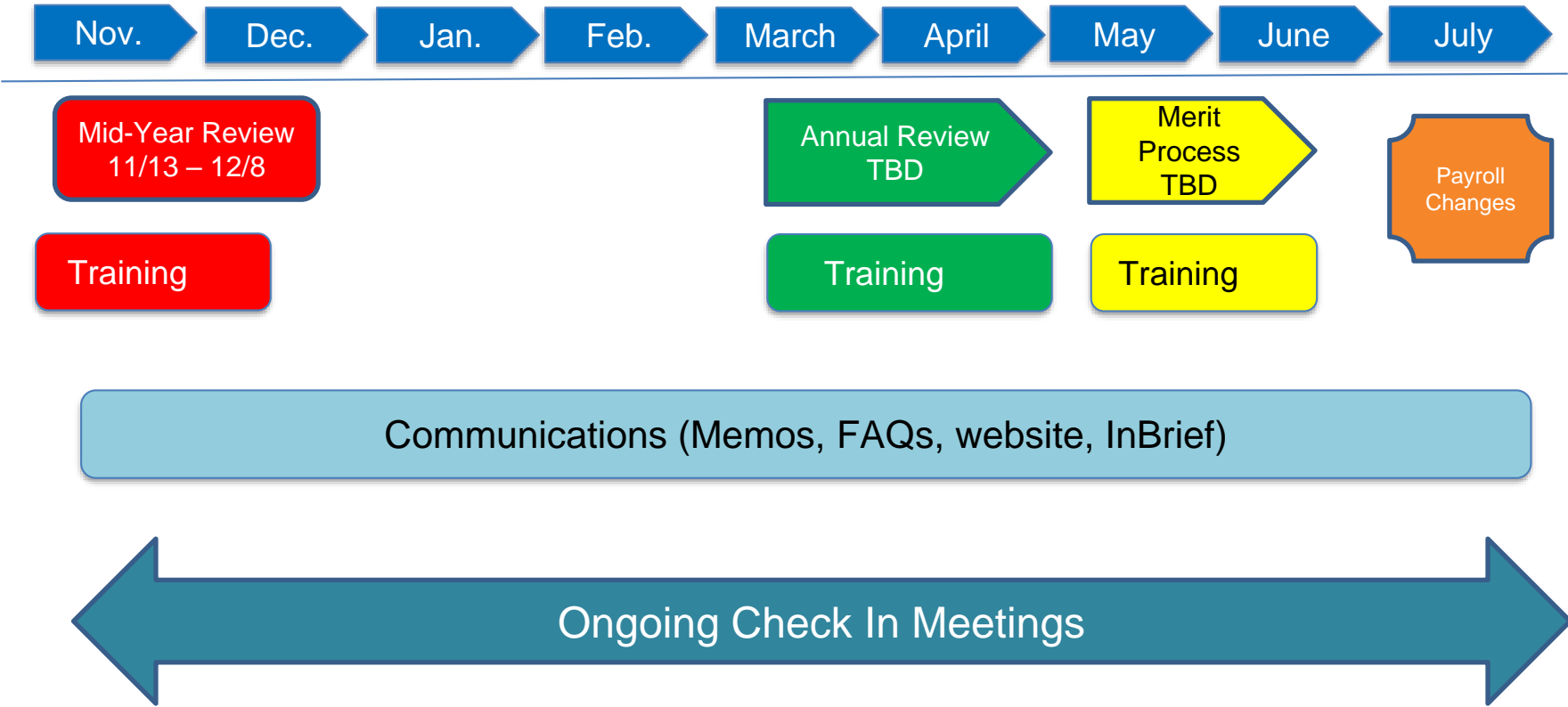
What about the performance review process can be most challenging?



MIDYEAR



TAP Timeline 2023-2024



TAP Manager Role – Review of Core Components

Check-Ins - Ongoing

- ✓ Ongoing meetings with staff. Should take place regularly.
- ✓ Workday functionality not needed.

Mid-Year Review - 2023

- ✓ Six-month review of staff performance; **Nov. 13 – Dec. 8**
- ✓ Simple, streamlined form, enabled in Workday. Staff and manager have input; manager selects status (on track or not-on track).

Annual Review - 2024

- ✓ Formal review of staff performance – Spring 2024.
- ✓ Automated form, enabled in Workday. Staff and manager have input; manager selects rating. Ratings connected to salary changes.

What's **NEW** for the 2023 Mid-Year Review

Topic/Theme	2022 Mid-Year	2023 Mid-Year	Result
Timeline	Workday opened from November 14, 2022 – January 13, 2023 (8 weeks.)	Workday opens from November 13-December 8 (4 weeks).	Will give ample time between Mid-Year and Annual review.
Performance Review Questions	7 Questions	5 Questions	Fewer and streamlined; eliminated redundancy.
Workday Functionality	Managers not being able to see the performance reviews of staff levels down in their organization.	Dashboard for managers to see in Workday for their areas: <ul style="list-style-type: none"> ▪ Completion ▪ Progress ▪ Trends 	Significant upgrade, result of helpful feedback from managers and division leaders.
Workday Functionality	Too many steps in workflow to complete and process ended with staff member	Fewer steps in the process workflow and process ends with the manager	Streamlined approach.
Workday User Interface	Questions on different screens/pages, unable to view entire list of questions.	Questions appear on one page.	User friendly, ability to see entire list of questions on one screen.

Helpful Strategies



How to Make the Most of Check-Ins with Your Manager

One-on-one meetings with your manager present valuable career opportunities. How can you make sure you are getting the most out of that time with your manager?

Work with your manager to determine how the agenda for your meetings will be created and reflect on your priorities and professional development goals.

During your meetings:

- Be aware of your body language
- Be an active listener
- Take in feedback, ask clarifying questions
- Adopt a problem-solving to any concerns or obstacles

Questions Your Manager Might Ask You

- How are things going?
- What have you been working on?
- Please update me on Project xyz.
- Are you on track to meet the deadline?
- What if any barriers exist that I can help with?
- What questions do you have?
- What challenges do you have?
- How can I provide support?
- Is there anything I have not asked you about that you would like to share?



Strategies to Prepare for Your Performance Review

- Keep track of your accomplishments throughout the year.
- Check in with your manager year-round.
- Review your set goals and progress made towards achieving them.
- Get clarity on what is expected of you. How does your manager define success for your performance?
- Be willing to ask for help or guidance.
- Request feedback regularly.
- Identify areas in which you want to improve your knowledge and/or skill.
- Think about your performance review not just as an opportunity to look back, but a forward-looking road map.



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Steps to Complete the Mid-Year Review

Workday opens on November 13 and will close on December 8.

Steps and Sequence

Step	Staff	Manager
1	Staff member completes questions in Workday. Submits.	
2		Manager receives email indicating that staff input has occurred.
3		Manager completes questions in Workday on staff performance.
4	Discussion with manager.	Manager discusses their input with staff. Agreement on content and status achieved <u>BEFORE</u> submitting.
5		Manager finalizes status (on-track or not on-track), records attestation and submits.

Mid-Year Performance Review Workflow in Workday



Workday Screenshot of Mid-Year Review Questions

Performance to Date and Future

Question What are your goals and objectives and what progress have you made achieving them?

Employee

Answer

Question What accomplishments are you most proud of so far this year? Are there areas that you feel you can improve on?

Employee

Answer

Question Describe how your work has contributed to the University and department mission and/or DEI objectives (where applicable)?

Employee

Answer

Question Are you having regularly scheduled check-in meetings and how effective have they been? Are there changes that could be made to make them more helpful?

Employee

Answer

Question What 2-3 things will you focus on in the next six months to help you grow and develop? What support do you need to accomplish this?

Employee

Answer

Mid-Year Review Questions: FY 24

TAP Mid-Year Review Questions

1. What are your goals and objectives and what progress have you made in achieving them?
2. What accomplishments are you most proud of so far? Are there areas you can improve upon?
3. Describe how your work has contributed to the University and department mission and DEI objectives (where applicable)?
4. Are you having regularly scheduled check-in meetings and how effective have they been? Are there changes that could be made to make them more helpful?
5. What 2-3 things will you focus on in the next six months to help you grow and develop and what support do you need to accomplish this?

RESOURCES



Resources

- [TAP Website](#)
- [Training for Managers and Staff](#)
- Job Aids/Step by Step Guides for Using Workday Performance
- E-learning – videos that walk you through Workday System
- [LinkedIn Learning Library of Videos](#)
- [Recommended Articles](#) (links are on TAP website scroll down to the end)

Resources - HR Business Partners

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We value your feedback!
Please complete the TAP Training Evaluation Survey



Questions?

