

Welcome to our virtual waiting room!

While you wait for the session to start, please take time to:

1. Familiarize yourself with BlueJeans
2. Check your name- update first and last if incorrect
 - 1 in the picture
3. Visit the chat window
 - 2 in the picture
4. Visit the question & answers window
 - 3 in the picture

BlueJeans Participant Screen

Attendee View

(David Lee)

Entry banner alerts Attendee that nobody will be able to see or hear them.

Event title → Sales Kickoff

Speaker Volume →

Mute Speaker →

Full Screen →

Exit the event →

Main (roster) view → 1

Chat w/ everyone → 2

Chat w/ Moderator →

Questions & Answers → 3

Expand side navigation (display Presenter roster) →

Settings (choose which speaker to use) →

Slider bar – drag to change the size of video and content

Year	RED	BLUE	GREEN	YELLOW
2004	40	10	10	10
2005	60	30	20	20
2006	70	40	30	30
2007	80	50	40	40
2008	90	60	50	50
2009	90	70	60	60
2010	90	80	70	70
2011	100	90	80	80

Lunch with Leaders: Top Tips for Meaningful Performance Reviews During Challenging Times

June 25, 2020



1 Nursing contact hour awarded.

Penn Medicine Nursing is an approved provider of continuing nursing education by the Pennsylvania State Nurses Association, an accredited approver by the American Nurses Credentialing Center's Commission on Accreditation. Approval # 124-3-H-15.

Virtual Meeting Norms

Actively participate to make this engaging! You have several opportunities:

- Respond to all polls using your phone.
- Ask the facilitator questions in the **Q&A window** unless directed otherwise.
- Share your experience, add a comment, or ask for clarification using the **Chat feature**. A moderator will monitor the chat.

Today's Agenda

- ▶ Welcome
- ▶ What is *Lunch with Leaders*?
- ▶ Today's Objectives:
 - Understand the current performance review process, forms, timeline and resources
 - Review tips for conducting a meaningful performance review discussion in the midst of challenging times
 - Share suggestions for a successful virtual performance review conversation
 - Understand how development planning can be used to reinforce strengths or address areas of opportunity identified during the performance review



Participate in Poll Everywhere

#1



#2 What emotions are you feeling today?

Lunch with Leaders Guests



Michelle Weitzman-Garcia, PhD & MA
Talent Management Consultant and
President of TME Consulting



Gretchen Kolb, MS
Director, Learning Innovation, PMA

When poll is active, respond at **Pollev.com/pennmedicine918**

Text **PENNMEDICINE918** to **22333** once to join

What emotions are you feeling today?

What do you find to be most challenging about the performance review process?

- Making the time **A**
- Writing up a meaningful review **B**
- Measuring qualitative and quantitative performance **C**
- Giving feedback/having the conversation **D**
- Creating accountability for goals **E**
- Building development opportunities **F**
- All of the above **G**

Performance Review Timeline FY20

June/July
Training for
managers &
employees

July/August
Manager and self
performance
assessment

September 8
Performance
evaluations due

October
Development
planning



Performance Review Form FY20

The image displays three overlapping Performance Review Form FY20 templates from Penn Medicine. The forms are for Education, Leadership and Administration, and Financial domains. Each form includes sections for Employee and Manager feedback, and a central 'Part A: Performance Results - Leadership Evaluation Self Evaluation and Manager Feedback' section.

Form 1 (Left): Penn Medicine logo, Name: _____, Date: _____.
EDUCATION: Supports the educational mission of the department.
Employee: _____
Manager: _____

Form 2 (Middle): Penn Medicine logo, Name: _____, Date: _____.
LEADERSHIP AND ADMINISTRATION: Provides strong leadership and administrative oversight both within and outside the departments, builds strong teams, develops and engages employees and faculty and ensures regulatory compliance.
Employee: _____
Manager: _____

Form 3 (Right): Penn Medicine logo, Name: _____, Date: _____.
FINANCIAL: Applies sound fiscal policy and accountability, manages operational and financial goals.
Employee: _____
Manager: _____

Part A: Performance Results - Leadership Evaluation Self Evaluation and Manager Feedback
Provide narrative on the key accomplishments/performance results of the employee being reviewed.
What results were achieved? E.g. What worked well? Where are there opportunities for improvement? What would you have done differently?

Form 1 (Left): CLINICAL: Ensures seamless department operations and the delivery of high quality and efficient care to patients and their families, including outstanding patient experience, timely access to care, and clinical quality.
Employee: _____
Manager: _____

Form 2 (Middle): RESEARCH: Oversees administration and financial integrity of research and translational efforts.
Employee: _____
Manager: _____

Form 3 (Right): CLINICAL: Ensures seamless department operations and the delivery of high quality and efficient care to patients and their families, including outstanding patient experience, timely access to care, and clinical quality.
Employee: _____
Manager: _____


3 Versions

- Manager, non-exempt and professional

Part A:

- Includes 6 variable performance result domains
- Include self-assessment for each domain, plus overall comments from employee and manager

Performance Review Form FY20




Name: _____
Date: _____

Part B: Assessment of Behavioral Competencies

Assess the degree to which you/your employee demonstrate(s) the Level 4 Penn Medicine Behavioral Competencies using the Level 4 rubric. Hover over the competency name and the "Needs Development," "Skilled," and "Talented" check boxes for the definition of each and rate yourself/your employee as appropriate. Check only one box per competency.

Level 1 Competencies	Employee Self-Evaluation					Manager Evaluation of Employee				
	Needs Development	Approaching Skilled	Skilled	Approaching Talented	Talented	Needs Development	Approaching Skilled	Skilled	Approaching Talented	Talented
Instills Trust	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Values Differences	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Patient/Customer Focus	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Critical Thinking and Problem Solving	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Collaborates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communicates Effectively	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ensures Accountability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Demonstrates Self-Awareness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Name: _____
Date: _____

Level 3 Competencies	Employee Self-Evaluation					Manager Evaluation of Employee				
	Needs Development	Approaching Skilled	Skilled	Approaching Talented	Talented	Needs Development	Approaching Skilled	Skilled	Approaching Talented	Talented
Persuades	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Builds Networks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Balance Stakeholders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Courage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Decision Quality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Level 4 Competencies	Employee Self-Evaluation					Manager Evaluation of Employee				
	Needs Development	Approaching Skilled	Skilled	Approaching Talented	Talented	Needs Development	Approaching Skilled	Skilled	Approaching Talented	Talented
Drives Engagement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Optimizes Work Processes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Develops Talent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Collaborates: Building partnerships and working collaboratively with others to meet shared objectives.

Needs Development	Skilled	Talented
<ul style="list-style-type: none"> Overlooks opportunities to work collaboratively with others Values own interests above others Shuts down lines of communication across groups Prefers to work alone and be accountable for individual contributions 	<ul style="list-style-type: none"> Works collaboratively with others across the organization to achieve shared objectives Represents own interests while being fair to others and their areas Partners with others to get the work done Gains support of others 	<ul style="list-style-type: none"> Models collaboration across the organization Facilitates an open dialogue with a wide variety of contributors and stakeholders Balances own interests with others Promotes high visibility of shared contributions to goals

Part B:

- Includes appropriate Penn Medicine competencies level based on role
- Includes self and manager assessment for each
- Area to address discrepancies, strengths and opportunities.
- No score associated with this section



Performance Review Form FY20

Penn Medicine

to

Part C: Goals for the Upcoming Year

Define individual goals below for discussion for the upcoming Fiscal Year. Goals for FY:

Individual Goal Title:

High Performance:

Target:

Threshold:

Individual Goal Title:

High Performance:

Target:

Threshold:

Individual Goal Title:

High Performance:

Target:

Threshold:

Employee's Comments (Optional)

Manager's Comments (Optional)

My signature indicates that this document has been reviewed with me.

Employee Signature:

Manager Signature:

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Penn Medicine

Name:

Date:

Part D: Career and Development Goals for the Upcoming Year

Define career aspirations and professional development goals for the upcoming year. FY:

CAREER GOAL:

Are you well placed and excited to continue growing in current role?
Would you like to be considered for a new role in the next 12 months? Please specify.
Where would you like to be in 2-5 years? Please specify.

CAREER GOAL:

PROFESSIONAL DEVELOPMENT GOALS:

What are your 1-2 development goals for the year ahead? Questions to consider:
Where are your opportunities for continued development in your current role?
Where are your opportunities for development in preparation to the role in which you aspire?
How can you leverage the work of the coming year to help you continue to develop?
What are the stretch assignments, classroom/online training, mentoring or sources for real time feedback that might assist your learning?

DEVELOPMENTAL GOAL #1:

DEVELOPMENTAL GOAL #2:

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Part C:

- Includes 3 performance goals for year ahead

Part D (Optional):

- Includes aspirational career goal
- Adds 2 professional development goals that are a part of the work of the year ahead instead of separate (what/how)



7 Principles for Meaningful Performance Reviews

Do

- ▶ Approach your evaluations with more flexibility, leniency, empathy and compassion.
- ▶ Think about what and why you are evaluating.
- ▶ Recognize and appreciate employees who are engaged and working hard.
- ▶ Use video for this conversation if you cannot be in person.

Don't

- ▶ Be hard-hearted toward your poor performers.
- ▶ Let your old biases creep in.
- ▶ Revert to business as usual.

Considerations for Virtual Performance Review

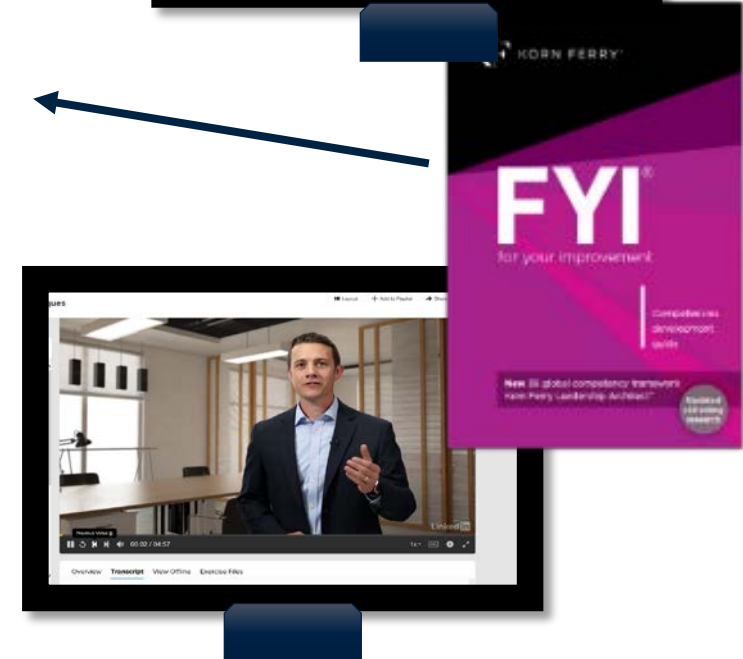
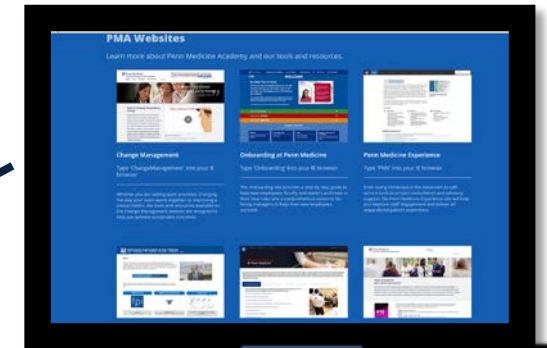
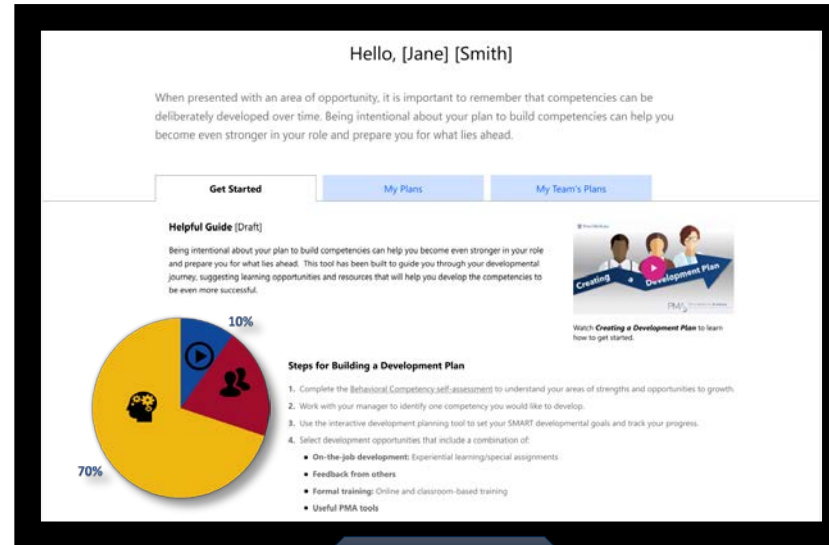
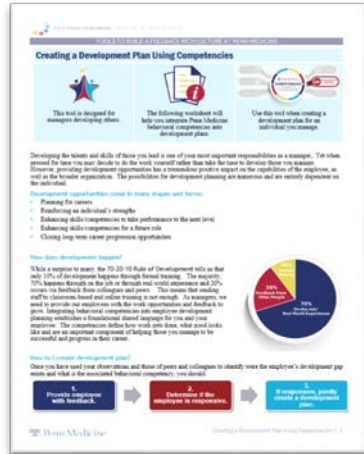
- ▶ Set the stage for a productive conversation
- ▶ Select a well-functioning technology
- ▶ Pick a time of day when you are both fresh
- ▶ Demonstrate your engagement
- ▶ Minimize background distractions
- ▶ Allow time for personal connection



Penn Medicine Competency Model



PMAs Customizable Development Planning Tool



Resources



PMA Resources:

- [PMA Talent Development Site](#)
- [PMA Leadership Pathways](#)
 - [Having productive performance reviews](#)
 - [Having development conversations](#)
- [Development Planning Tool](#)

Other Resources:

- [How to Do Performance Reviews — Remotely by HBR](#)
- [Leading Remote Teams by LinkedIn Learning](#)

Training:

- “Tools and Resources for Building a Feedback Rich Environment” July 16th, 2020

Upcoming Lunch with Leaders Livecast

Next week, we will discuss:

The Five Secrets to Successful Virtual Meetings and Trainings

July 9, 2020 at 12pm



Lunch with Leaders



Exit Poll Everywhere

