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
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.
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.

Please note that the session will be recorded
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 Participate in Poll Everywhere

#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
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

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
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
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.

https://hbr.org/2020/06/how-to-do-performance-reviews-remotely
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

Level 1 Competencies correspond to BE Standards

1. COMPASSIONATE
   - Instills Trust
   - Values Differences

2. MANAGES CONFLICT
   - Tech Savvy
   - Self-Development
   - MANAGES AMBIGUITY

3. PERSUADES
   - Builds Networks
   - Balances Stakeholders

4. DRIVES ENGAGEMENT
   - Optimizes Work Processes
   - Develops Talent
   - Plans and Aligns
   - Directs Work

5. ORGANIZATIONAL SAVVY
   - Drives Vision and Purpose
   - Strategic Mindset

BE

ACCOUNTABLE
- Ensures Accountability
- Demonstrates Self-Awareness

EMPOWERED
- I drive results with intention.
- I partner with unwavering support

COMPASSIONATE
- I serve with my head and heart.
- PRESENT
- I show up and remain engaged.

COLLABORATIVE
- I partner with unwavering support

PRESENT
- I show up and remain engaged.
- Critical Thinking and Problem Solving
- Communicates Effectively
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
Exit Poll Everywhere