Welcome to our virtual waiting room!

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

1. Mute yourself – audio and video
   ➢ 1 in the picture
2. Visit the chat window
   ➢ 2 in the picture
3. Check your name - update if incorrect
   ➢ 3 in the picture
   ➢ We are using these names to track attendance

BlueJeans Participant Screen

1. Camera mute, Audio Mute, Share your screen and Leave meeting
2. People roster, Chat, Apps and Settings
3. People roster detail

Who's talking
Hide menu
View People

Click to see only who's talking (also shown by blue mic highlight)
Click pencil to change your name. Mute/unmute your camera or microphone.
Note: only moderators (marked by a badge next to the name) can also mute & unmute other participants
Click name to see call details and connection stats. Moderator has ability to drop them from meeting
Moderators only can Mute & Unmute All participants at once
Copy meeting link & share with others

Click pencil to change your name.
**Leading Others:**

How to find forms, tools and resources to make the evaluation process easier and more meaningful

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A link to the slides will be emailed at the end of the week.
Strong performance requires a clear understanding of expectations and progress.
Both positive and constructive feedback increase employee engagement.

Engagement is related to outcomes and patient experience.
Feedback Rich Environment

Focus
Improving effectiveness in the current job

Purpose
Provide positive reinforcement for skills that contribute to performance or correct habits and behaviors to address a performance gap

Nature
Formal

“I want to promote a more feedback rich environment within my team”

Giving Feedback
Giving Real Time Feedback
Giving Performance Feedback
Giving Feedback for Development
Giving Feedback Manager Huddle Sheet
Soliciting Feedback
Receiving Feedback
Penn Medicine Rubric All Levels
Understanding the Rubric Manager Huddle Sheet

Tools and Resources for Building a Feedback Rich Environment

30 Minute Coach: Penn Medicine Behavioral Competency Model
Creating a Feedback Rich Environment Using the Penn Medicine Rubric
Why Performance Reviews?

“I want to make the performance review process even more productive for my employees”

Annual Performance Review

- Summarize accomplishments
- Plan together for continued success

Employee

Manager
Why Performance Reviews?

“I want to make the performance review process even more productive for my employees”

Prepare yourself to host a productive performance review conversation

Familiarize yourself with the form and process by using the following resources:

- Review the following job aids, Giving Performance Feedback and Using Competencies During Performance Reviews, to better understand your role as a manager in the performance review process.
Performance Appraisal Process

**Start**
Manager introduces process, expectations & timeline

**Assess**
Employee completes performance self-evaluation

**Document**
Manager reviews self-evaluation and documents his/her feedback

**Converse**
Employee and manager meet for performance discussion

**Submit**
Manager submits final version to Employee Records

**Plan**
Employee and manager collaborate on a strategy to reach agreed upon goals
Introduce the topic, process and form during a staff huddle or team meeting

Performance Process from the Employee’s Perspective

<table>
<thead>
<tr>
<th>Start</th>
<th>Converse</th>
<th>Plan</th>
</tr>
</thead>
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<tr>
<td>Manager introduces process, expectations &amp; timeline</td>
<td>Conduct the formal performance evaluation</td>
<td>Employee and manager collaborate on a strategy to reach agreed upon goals</td>
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**Assess**
- Employee writes self-assessment
- Manager writes appraisal

**Consider**
- Reflect on the similarities and differences between employee and manager perspectives

**Set Expectations**
- Thoughtfully complete the self-evaluation by the due date
- Pick a few competencies as “talented” and at least one “needs development”
- Draft goals for FY21
- Read through manager evaluation prior to performance discussion
- Keep an open mind

---

**Performance Process from the Employee’s Perspective**

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**Preparing for Performance Eval Manager Huddle Sheet**

- **As a team or individually, have your staff watch the microlearning “Using Competencies During Performance Reviews” located on the PMTA Talent Development website.**
- **At your next meeting or huddle, distribute the job aid: “Preparing for a Performance Review Discussion,” located on the PMTA Talent Development website for Individual Contributions, and the performance review form you plan to use for the performance review process. Download the form from the HR Manager site or use the Penn Medicine Behavioral Competency Self-Evaluation stand-alone document. If you use another version of the form.**
- **Review the performance review form, identifying and discussing the included behavioral competencies. Explain what is new this year and timeline for your team.**
- **Discuss the job aid and ask questions like:**
  - How can we use this tool to make the performance review discussions more effective?
  - Tell me about the most productive performance review discussion you ever had.
  - What will you do differently this year to prepare for your performance review?
- **Have your employees use “Preparing for a Performance Review Discussion” to complete their performance review form.**
- **Complete your portion of the performance review form and meet privately with each individual to discuss higher performance for the year. Consider having them review “Tips for Receiving Feedback” prior to your conversation.**
- **Once this process is complete, at the next staff meeting or huddle, ask questions like:**
  - What did you think of the performance review process? What would you change?
  - How did you prepare for your performance review discussion? Was the conversation helpful?
  - Was there anything in the conversation that surprised you?
  - What can I do to support you to continue to be successful?
- **Continue to provide on-going feedback.**
Performance Review Forms FY21

3 Versions
- Manager, non-exempt and professional
- Performance Result
- Self Reflection
- Manager Evaluation

- Goals from prior year
- Professional Practices (KSA)
- Examples from Practice
- Peer Review
- Self Reflection
- Manager Evaluation
Performance Review Forms FY21

Part D: Career and Development Goals for the Upcoming Year

• Performance goals for year ahead
  (Optional):
  • Aspirational career goal
  • Professional development goals

• Professional and organizational goals
Collaborates: Building partnerships and working collaboratively with others to meet shared objectives.

Both Include:
- Penn Medicine Competencies
- Self and manager assessment

Needs Development
- 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

Skilled
- 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

Talented
- 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

Using the Penn Medicine Rubric
Using Competencies During Performance Reviews
Preparing to Write

Review documents and conversations

- Job description
- Previous performance reviews
- Employee Self-Assessment
- Notes accumulated during the year
- Feedback from other sources
- Performance Data
Preparing to Write

**Identify:**

- Accomplishments
- Progress on goals
- Areas of exceptional performance, growth or where development is needed
- Additional responsibilities taken on
- Contributions to special projects
- Challenges encountered
- Demonstrated behaviors that are talented or needs development
## Writing the Evaluation

### Identify:
- Accomplishments
- Progress on goals
- Areas of exceptional performance, growth or where development is needed
- Additional responsibilities taken on
- Contributions to special projects
- Challenges encountered
- Demonstrated behaviors that are talented or needs development

### Document:
- Use clear, concise language to describe:
  - Performance vs. expectations
  - Key contributions
  - Strengths and development opportunities
  - SMART goals for the coming year
- Cite specific examples
- Provide actionable feedback
- Celebrate successes and position shortfalls as an opportunity for learning and adjustment

### Focus:
- Highlight accomplishments, strengths, obstacles, and areas for development
- Consider achievement towards goals and what might be needed moving forward
- Determine the most important messages to convey
- Note self-assessment and evaluation discrepancies
- Prepare for employee reactions
Performance Evaluation Conversation Tips

- Approach your evaluations with flexibility, empathy and compassion
- Recognize and appreciate employees who are engaged and working hard
- Come prepared with notes and questions
- Demonstrate your engagement
- Use time to build personal connection
- Reflect before you react
- Ask questions and get clarifications

If virtual...
- Test technology in advance
- Minimize background distractions

https://hbr.org/2020/06/how-to-do-performance-reviews-remotely
What if your employee seems like this during a review discussion?
Amygdala Hijack

Amygdala can cut off access to our “rational brain”

We react first, think later

Leading with emotional intelligence

Don't Tell an Upset Person to Calm Down
Image from https://blog.ttisi.com/emotional-intelligence-prevents-amgydala-hijack
Amgydala Hijack

Visible Signs
- Pupils dilate
- Face pales or becomes flushed
- Shoulders tense
- Breathing becomes faster and/or shallow
- Fidgeting or trembling increases

Halt the Amygdala Hijack
- Mirror emotion with empathy
- Clarify cause of emotion
- Address cause calmly
- Avoid commands
- Take a break
How can you help your employee get from \( \text{\textbullet} \) to \( \text{\textbullet} \)?

A Growth Plan

- Education / Certifications
- Mentoring
- Technical Skills
- On-the-job Experiences & Stretch Assignments
- Behavioral Competencies
- Training Classes

Development Planning
Creating a Development Plan
Using Behavioral Competencies for Development Planning and Interviewing
How can you help your employee get from A to B?

**Step 1: Enter your manager's full name.**

**Step 2: Select a competency you would like to develop. You can pick one competency per plan.**

**Step 3: Tell us about your development goals.**

**Step 4: How would you assess yourself?**

**Step 5: Choose development activities and action steps.**

*Reminder:* Select at least two on-the-job development activities and one formal training with feedback from others.

**Feedback Source:**
- My Manager

**Timeframe for Completion:**
- 90 days

*Please enter a date after 30 days*

**Describe your action steps:**
1. I will be intentional when spending time with my patients.
2. I will look for areas we could improve the patient experience.
3. I will identify an area that could be improved, I will build a plan with suggestions for improvements.
4. I will present my plan to my manager and ask for feedback.

**Using Behavioral Competencies for Development Planning and Interviewing**
I have an employee who is ready for further development but there isn’t a position open in my department, what can I do?

I have an employee who is disengaged or underperforming, are there resources to help?

The process seems very intense; are there any shortcuts?

I disagree with my employee. How should I handle the discrepancy in our assessments?

"I have a high potential employee or faculty member ready for further development"

"I want to have more development feedback conversations with those I manage"

"I have an employee who is underperforming or is disengaged"
*****

**Questions? Comments?**

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<td><strong>PennCOBALT</strong> a tool for the Penn Community that uses targeted assessments to direct you to the right level of coping support.</td>
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<td><strong>Lead Strong</strong> Live discussions and curated resources for Penn Medicine employees around leading yourself and your team during adversity.</td>
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<tr>
<td><strong>WELLfocused</strong> a program dedicated to making living a healthy lifestyle easier, by providing tools, resources, educational campaigns and health-related challenges to help improve overall well-being</td>
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<td><strong>Daniel Pink on Motivation</strong></td>
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SMART Goals

- Be thoughtful and **specific** about what you want to focus on.
- Pick a goal that is **measurable** so you can continually monitor your progress.
- Set yourself up for success by choosing something that is **achievable**.
- Be **realistic** when choosing your goal. Think about how it will affect your day-to-day life.
- Be aggressive and realistic when setting your end **time** or date. Knowing there’s an end in sight will help you focus and push yourself.
Directions to find, save and open appraisal forms

1. Go to the Human Resources site on the intranet.

2. Select Manager Forms
Directions to find, save and open appraisal forms

3. Select **Performance Appraisals**

4. Right click on the appropriate template

5. Select **Save Link As**
Directions to find, save and open appraisal forms

6. Save template to your computer

7. Double click on the template file to open it Adobe Acrobat Reader

Don’t know which template to use? Ask your manager or HR Business Partner