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 blue 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

BlueJeans Participant Screen

Hide Video Thumbnails
Switch Video and Content Frames
Your self view, with quality bar and mic status
Send Meeting link to others

BlueJeans.com/6766088930
Leading Self:
How to use your self-evaluation and manager feedback to help shape the year ahead
Strong performance requires a clear understanding of expectations and progress.

Feedback is the key to understanding. Goals. Current Performance.
Feedback Rich Environment

Both positive and constructive feedback increase employee engagement.

Engagement is said to have a relationship with outcomes and patient experience.
Feedback Rich Environment

**Focus**
Providing immediate feedback after an observation

**Purpose**
Provide positive reinforcement for skills or correct habits and behaviors

**Nature**
Brief and informal
**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
Feedback Rich Environment

**Focus**
Future goals, career development, succession planning

**Purpose**
Build on strengths and develop skills over time in order to help someone achieve their long-term career goals

**Nature**
Formal

**Focus**
Providing immediate feedback after an observation

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Provide positive reinforcement for skills or correct habits and behaviors

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Brief and informal

**Focus**
Improving effectiveness in the current job

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

**Nature**
Formal
Why Performance Reviews?

Annual Performance Review

- Summarize accomplishments
- Plan together for continued success

Employee

Manager
Performance Appraisal Process

**Assess**
Employee writes self-assessment
Manager writes appraisal

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

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

**Converse**
Conduct the formal performance evaluation

**Plan**
Employee and manager collaborate on a strategy to reach agreed upon goals

Preparing for a Performance Feedback Discussion
Performance Review Form 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

Human Resources site
• 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.

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

Both Include:
- Penn Medicine Competencies
- Self and manager assessment
Considerations for Your Self-Evaluation

- Review FY 20 goals and your progress against those goals
  - Document how you used feedback to get even better results in FY20
Considerations for Your Self-Evaluation

Review FY 20 goals and your progress against those goals
- Document how you used feedback to get even better results in FY20

Provide your key accomplishments. If possible:
- Quantify your achievements
- Relate them to the team and organizational goals
Considerations for Your Self-Evaluation

Review FY 20 goals and your progress against those goals
- Document how you used feedback to get even better results in FY20

Provide your key accomplishments. If possible:
- Quantify your achievements
- Relate them to the team and organizational goals

Note opportunities for improvement
- Demonstrate self-awareness
- Identify focus areas for FY21 – how do you want to grow?
Considerations for Your Self-Evaluation

Review FY 20 goals and your progress against those goals
• Document how you used feedback to get even better results in FY20

Provide your key accomplishments. If possible:
• Quantify your achievements
• Relate them to the team and organizational goals

Note opportunities for improvement
• Demonstrate self-awareness
• Identify focus areas for FY21

Demonstrate professionalism
• Maintain focus on yourself
• Avoid grade inflation
Considerations for Your Self-Evaluation

Review FY 20 goals and your progress against those goals
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- Demonstrate self-awareness
- Identify focus areas for FY21

Demonstrate professionalism
- Maintain focus on yourself
- Avoid grade inflation

Determine Future Goals
- What work would you like to do more or less of next year?
- What do you want to accomplish career-wise in the coming year?
Performance Evaluation Conversation Tips

- Review the manager evaluation prior to the meeting
- 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
Take Time to Reflect

- Where did you and your manager agree or disagree?
- What was surprising? Why?
- Do you need to revise your SMART goals? How?
- How will you set yourself up for success?
What do you need to get from to ?

A Growth Plan

- Training Classes
- Education / Certifications
- Mentoring
- Behavioral Competencies
- On-the-job Experiences & Stretch Assignments
- Technical Skills
- Education / Certifications
Step 1: Build a Development Plan

My Development Plan

Step 1: Enter your manager's full name.

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

Step 3: Tell us about your development goals.

Step 4: How would you assess yourself?

Step 5: Choose development activities and action steps.

Feedback Source: My Manager

Timeframe for Completion: 90 days

On-the-Job Development Ideas:
- Spend time with your clients or patients. Identify areas where a simple change ...
- Spend time with your clients or patients. Identify areas where a simple change might improve your observations and present them to your manager.

Activity Type:
- On-the-Job Development
- Formal Training
- PMA Tools

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. Once I 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.

Online and classroom-based training courses:
- Build relationships by impacting others
- Please select one...
- Focus on Service
- Management Tips
- Leading a Customer-Centric Culture (2013)
- Using Customer Surveys to Improve Service
- Building Customer Loyalty
- Customer Service Foundations
- Building relationships by impacting others
- Building a customer-loyalty strategy

Timeframe for Completion: 90 days
Questions?

- I don’t know what my goals are from last year; what should I do?
- The process seems very intense; are there any shortcuts?
- I am not familiar with competencies – how can I learn more?
- I disagree with my manager. How should I handle the discrepancy in our assessments?
PennCOBALT a tool for the Penn Community that uses targeted assessments to direct you to the right level of coping support.

Lead Strong Live discussions and curated resources for Penn Medicine employees around leading yourself and your team during adversity.

WELLfocused 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.

Penn Medicine Academy:
- Pathway:
  - “I want to promote a more feedback rich environment within my team”
- Job Aids:
  - Soliciting Feedback
  - Receiving Feedback
  - Penn Medicine Rubric All Levels
  - Identify a Mentor for Career Growth and Development
- Undergraduate and Graduate Programs - Selecting the Best Fit
- Classes
  - Tools and Resources for Building a Feedback Rich Environment
  - 30 Minute Coach: Penn Medicine Behavioral Competency Model
  - Lead Strong: Top tips for meaningful performance reviews during challenging times

Articles
- What Self-Awareness Really Is (and How to Cultivate It) (hbr.org)
- 10 performance review tips for employees | Weekly10
- Performance Reviews: A Smart Guide to Self-Evaluating (tinypulse.com)
- Receiving Feedback With Grace and Dignity (thebalancecareers.com)

LinkedIn Learning
- Career Advice from Some of the Biggest Names in Business
- Be intentional about your energy
- The Power of Changing Your Perspective
- Why you should ask for feedback
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