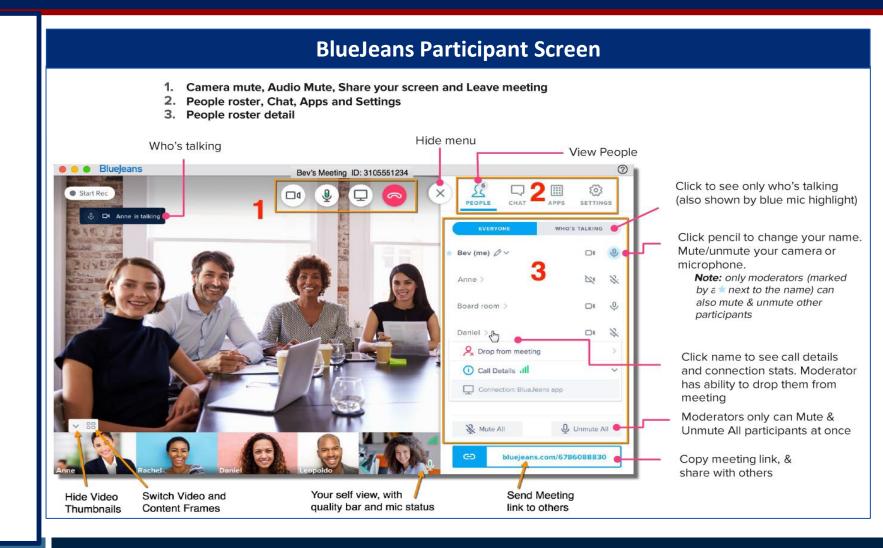
Welcome to our virtual waiting room!

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

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









Leading Self:

How to use your self-evaluation and manager feedback to help shape the year ahead

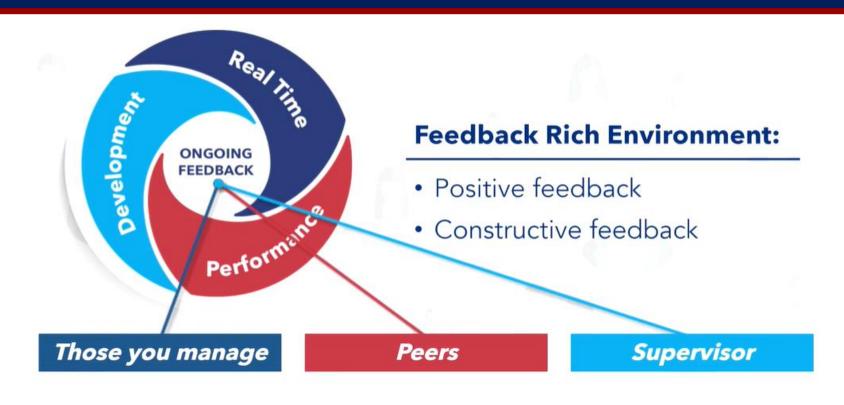


Strong performance requires a clear understanding of expectations and progress



Both positive and constructive feedback increase employee engagement

Engagement is said to have a relationship with outcomes and **patient experience**.











Focus

Providing immediate feedback after an observation

Purpose

Provide positive reinforcement for skills or correct habits and behaviors

Nature

Brief and informal



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

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

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Why Performance Reviews?

Annual Performance Review



Performance Appraisal Process

Assess

Employee writes selfassessment Manager writes appraisal

Consider

Reflect on the similarities and differences between employee and manager perspectives



Start

Manager introduces process, expectations & timeline

Converse

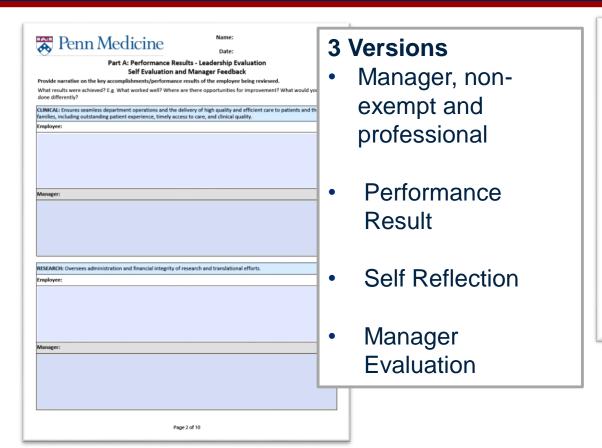
Conduct the formal performance evaluation

Plan

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

Performance Review Form FY21





= Occasionally Exceeds Standards = Consistently Meets Standards	Instructions: Nurse Manager completes this section base of the clinical nurse's self-appraisal and peer review.	d on their review
Occasionally Does Not Meet Standards	The final reportable score is the score determined by the nurse manager.	
= Consistently Does Not Meet Standards	SELF-EVALUATION	MANAGER EVALUATION
Continuous Quality Improvement	0	-
vidence-Based Practice & Research	0	
eadership	0	
Person & Family Centered Care	0	-
Professionalism	0	-
Safety	0	-
Teamwork	0	
Technology/Informatics	0	0.00
EVALUATION SCORE	0.34	0.00
vidence Grid supports current level	-	
f no, explain why:	r, recommend that this employee consider application to advan	

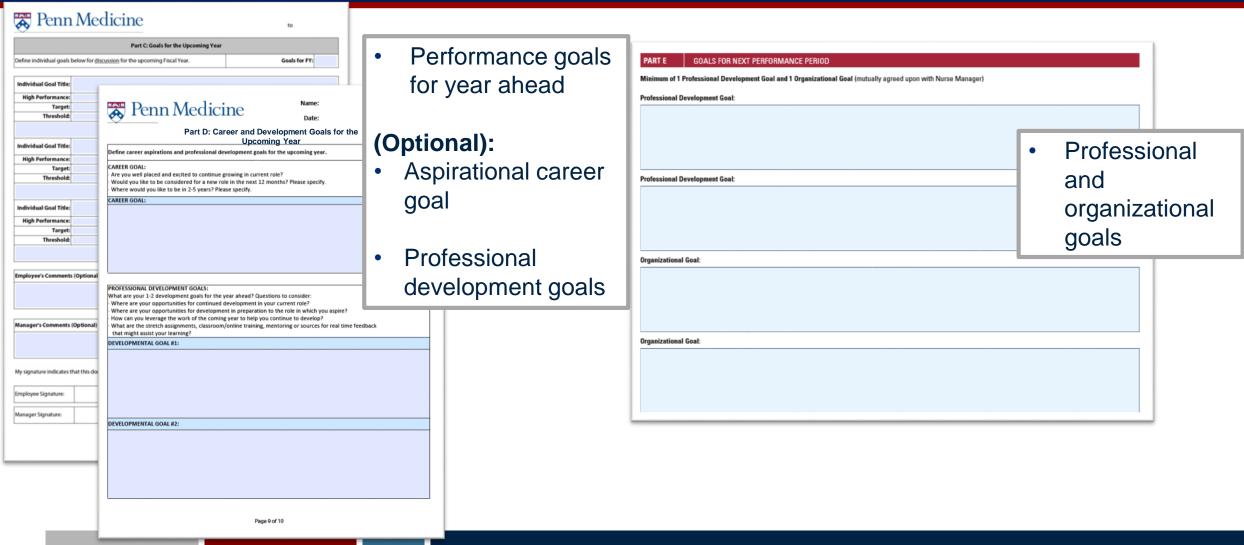
Human Resources site

Goals from prior year

- Professional Practices (KSA)
- Examples from Practice
- Peer Review
- Self Reflection
- Manager Evaluation

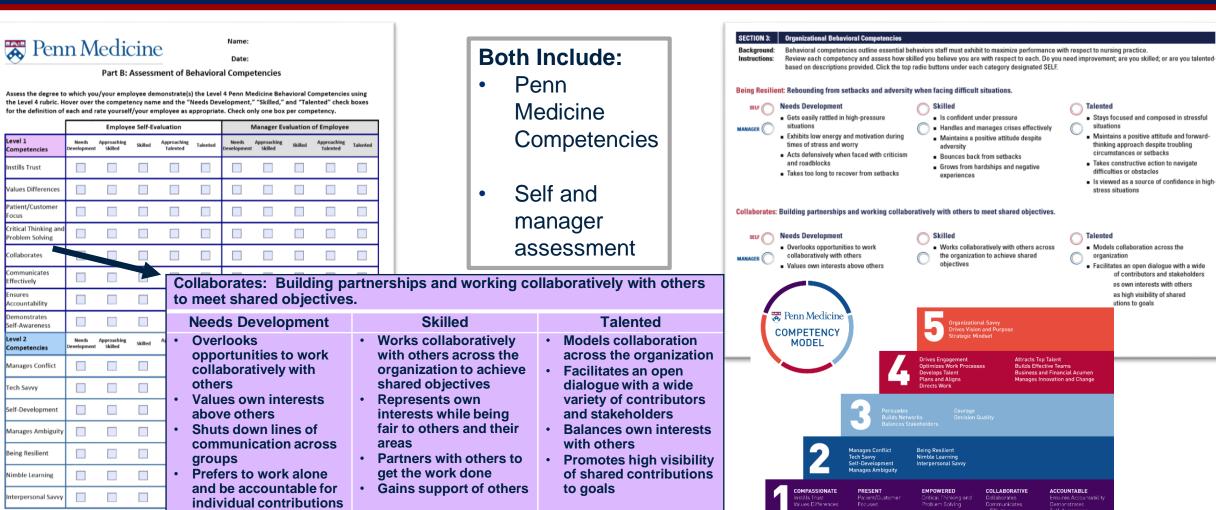
Performance Review Forms FY21





Performance Review Forms FY21

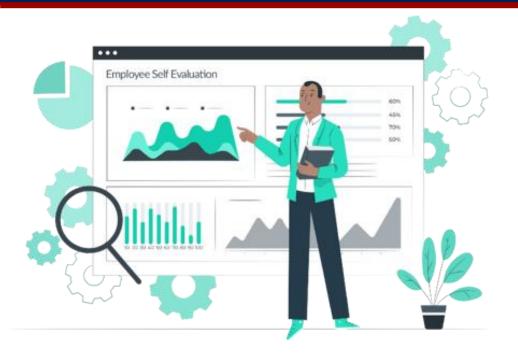












Review FY 20 goals and your progress against those goals

• Document how you used feedback to get even better results in FY20





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Provide your key accomplishments. If possible:

- Quantify your achievements
- Relate them to the team and organizational goals





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Note opportunities for improvement

- Demonstrate self-awareness
- Identify focus areas for FY21 how do you want to grow?





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





REALISTIC

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Note opportunities for improvement

- 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. . .

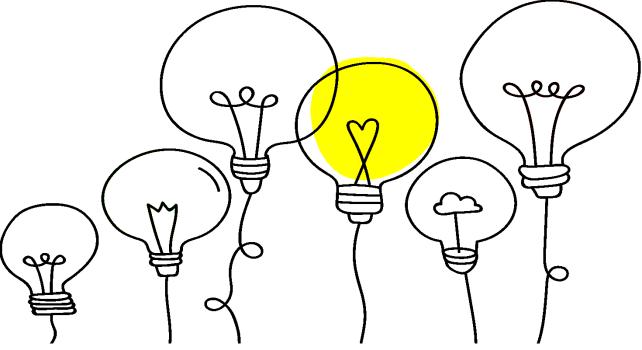
- Test technology in advance
- Minimize background distractions

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 ?





Step 1: Build a Development Plan



My Development Plan **Development Planning** Creating a Development Plan Step 1: Enter your manager's full name. My Development Plan Step 2: Select a competency you would I Competency Chosen: Patient/Customer Focus Step 1: Enter your manager's full name. Reminder: Validate selections with your My Development Plan Level 1 Step 2: Select a competency you would like to develop. You can pick one competency On-the-Job Development Ideas Ensures Accountability O Communicates Effectively Step 3: Tell us about your development goals. Spend time with your clients or patients. Identify areas where a simple change ... Critical Thinking and Problem Solvin Spend time with your clients or patients. Identify areas where a simple change might improve their overall experience. Document **Step 4:** How would you assess yourself? your observations, suggestions and present them to your manager. Level 2 **Step 5:** Choose development activities and action steps. Manages Conflict Feedback Source Timeframe for Completion Manages Ambiguity My Manager 90 days Reminder: Select at least two on-the-job development activities and one formal training w Interpersonal Savvy *Please enter a specific date if possible Activity Type Describe your action steps PMA Tools Level 3 1. I will be intentional when spending time with my patients. Persuades 2. I will look for areas we could improve the patient experience. On-the-Job Development Ideas Courage 3. Once I identify an area that could be improved, I will build a plan with suggestions for improvements Spend time with your clients or patients. Identify areas where a simple change ... 4. I will present my plan to my manager and ask for feedback Level 4 Spend time with your clients or patients. Identify areas where a simple change might impro O Drives Engagement your observations, suggestions and present them to your manager. Plans and Aligns **Activity Type** Remove this activity Feedback Source Timeframe for Compl Builds Effective Teams PMA Tools Create My Own Activity 90 days My Manager *Please enter a specific date if possii Level 5 Online and classroom-based training/courses Timeframe for Completion Organizational Savvy Describe your action steps 90 days Build relationships by impacting others 1. I will be intentional when spending time with my patients. *Please enter a specific date if possible Please select one... 2. I will look for areas we could improve the patient experience. Continue to Step 3 Focus on Service 3. Once I identify an area that could be improved, I will build a plan with suggestions for in Management Tips 4. I will present my plan to my manager and ask for feedback Step 3: Tell us about your development q Leading a Customer-Centric Culture (2013) Using Customer Surveys to Improve Service **Building Customer Loyalty** learnings to my relationships with my Customer Service Foundations Add a New Activity Submit My Plan Build relationships by impacting others Building a customer loyalty strategy

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?

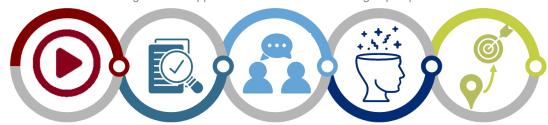


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Questions? Comments?

Penn Medicine Resources

- 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
 - <u>Identify a Mentor for Career Growth</u> <u>and Development</u>
 - <u>Undergraduate and Graduate</u>
 <u>Programs Selecting the Best Fit</u>
 - Classes
 - Tools and Resources for Building a Feedback Rich Environment
 - 30 Minute Coach: Penn Medicine Behavioral Competency Model
 - Lead Strong: <u>Top tips for meaningful</u> <u>performance reviews during</u> <u>challenging times</u>

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

SM A R T

Be thoughtful and **specific** about what you want to focus on.

Pick a goal that is **measurable** so you can continually monitor your progress.

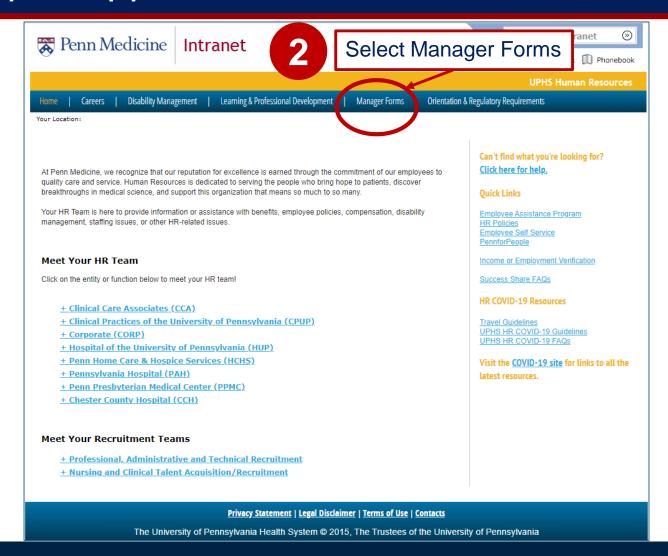
Set yourself up for success by choosing something that is achievable.

Be **realistic** when choosing your goal. Think about how it will affect your day-to-day life.

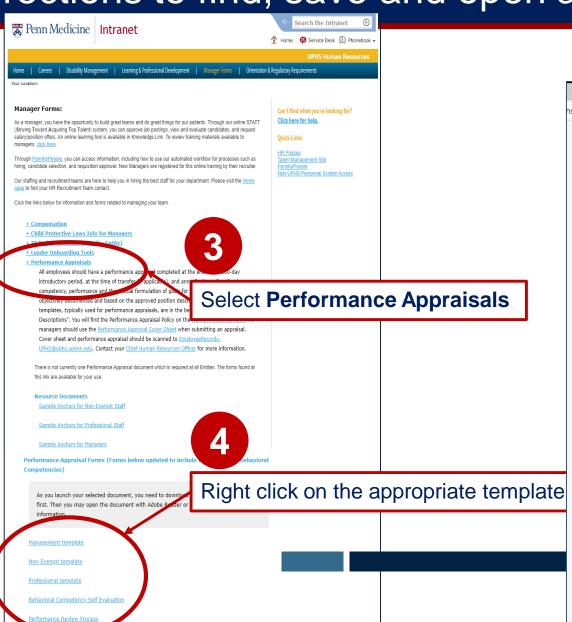
Be aggressive and realistic when setting your end **time** or date. Knowing there's an end in sight will help you focus and push yourself.

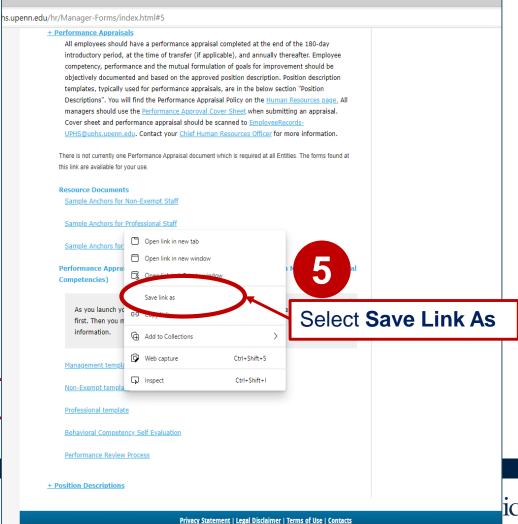
Directions to find, save and open appraisal forms

Go to the <u>Human Resources site</u> on the intranet.

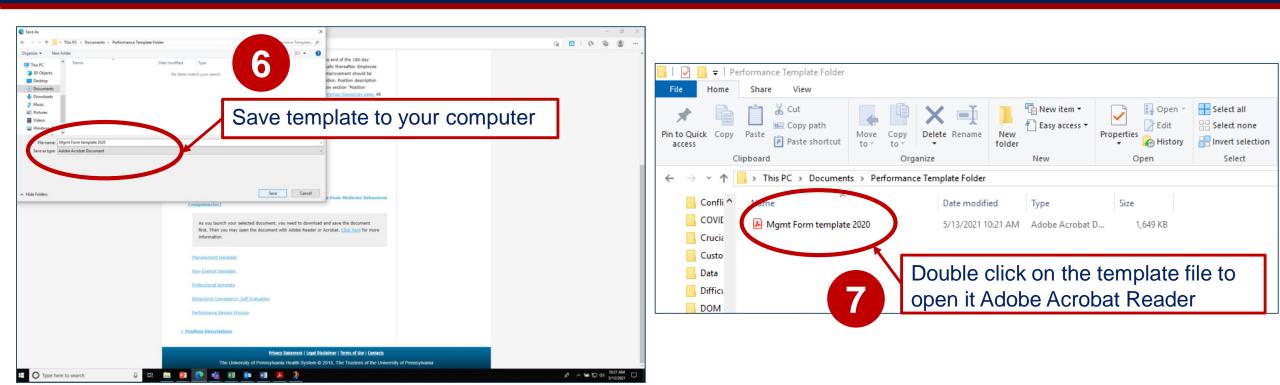


Directions to find, save and open appraisal forms





Directions to find, save and open appraisal forms



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