
2009-2010 performance evaluations for PPA and Taleo implementation

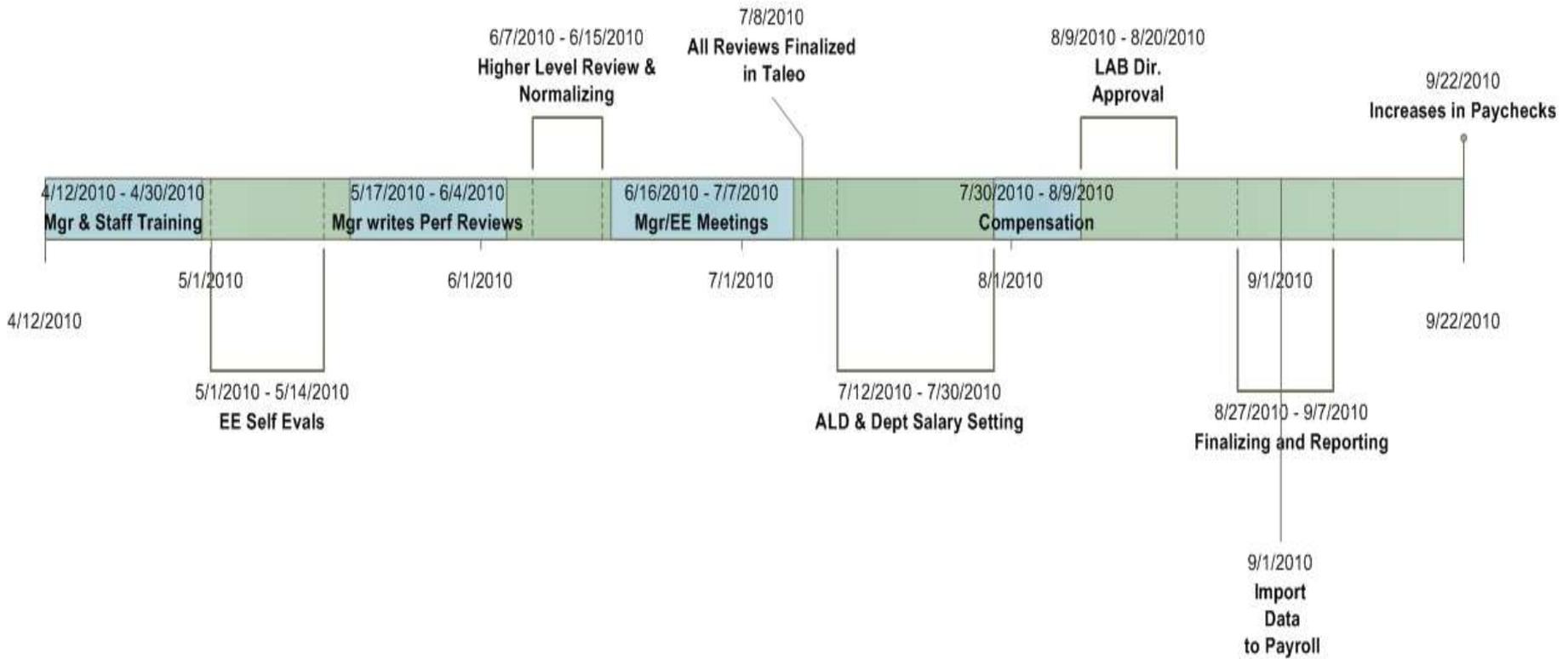
PPA Management
May 12, 2010

Overview of Plan

- Conduct performance reviews with Taleo on HR timeline
 - Slight adjustments in deadlines to reflect initial teething pains
- Integrate review and update of Position Summaries (= job specific R2A2s) into process with completion by Sep 1
- Address development of meaningful performance goals to be captured in Taleo as well
 - Including provision for interaction with PPA management our plan is to finalize individual goals by Sep 1
- Input to salary setting exercise in July
 - Note that performance assessment and merit increases are closely related, but there is no formulaic connection between the two

Performance Evaluation/Salary Setting Timeline

Performance Management Timeline



Step 1

- May 1-21 [extend self-evaluation period 1 week]
 - Managers review “Active Direct Reports” list in Taleo for accuracy at <https://tbe.taleo.net/MANAGER/dispatcher/login.jsp>
 - What if the list or the form is not correct? Contact Debbie Tryforos & Kathy Webb
 - What if employee does not complete self-evaluation by 5/21? Managers can start a performance evaluation anyway, but will no longer be able to import the employee self-evaluation without loss of information
 - Remember to solicit input in some form from functional supervisors by 5/21
 - Employees must complete self evaluation at <http://tbe.taleo.net/NA12/ats/ews/EmployeeWebsiteLogin.jsp?org=SLAC&ewsId=3>
 - We recommend printing a copy before submitting and sending a separate email to your supervisor
 - Do NOT submit until your self-evaluation input is complete!
 - Goals section will be completed separately [see instructions below]

Step 2

- May 22-June 6 [includes weekends]
 - Managers complete draft reviews for all direct reports
 - You can copy the employee self-evaluation to start or use a blank form
 - You should save, but not sign, the draft form when completed
 - Print a copy for your records in case the draft is lost for some reason

Step 3

- June 7-15
 - PPA management and Division Heads will comparatively assess consistency of evaluation grades across PPA
 - Intend to review comparative reports by job classification, department and/or division and provide feedback to supervisors
 - Expect a second round of comparative assessments of proposed merit increases will be part of the salary setting exercise to follow in July

Step 4

- June 15-Jul 7
 - Managers and employees meet to complete review
 - Review managers draft performance evaluation
 - Suggest managers print a draft evaluation and record changes on the draft for electronic implementation
 - Once changes are implemented, complete signature section, and then submit the review
 - Print a copy for your records and provide a copy to Kathy Webb
 - Review STA status
 - Discuss goal setting and initial ideas for FY2011 [See implementation plan below]
 - Discuss vacation plans in light of 320 hour limit by 1/31/11

Recommendations on evaluation forms

- Staff: Anyone without direct reports*, except staff scientists
- Staff scientist: Staff scientists
- Supervisor: Faculty as line managers or staff with direct reports*
- Scientist/Manager: Staff scientist with direct reports*, typically department head
- Upper Management: PPA scientific senior management

*Outside of RAs and students

Recommendations on goal setting

- Goal setting is an essential part of performance evaluation
 - Goals should be SMART: Specific, Measurable, Aggressive & Attainable, Realistic, and Time-bound
 - Challenging change of culture and challenging in a research setting
- Plan
 - First discussion of goals for FY2011 at manager-employee performance review [June 15-July 7]
 - Employee uses Taleo Goals section to establish a draft set of goals [July 8-31]
 - Goals can be short term or year-long: as long as start date falls into a performance period, these will be available for next year's review
 - Department Heads discuss FY2011 department-level goals with Division Head/PPA Management [July 8-31]
 - Manager and employee meet to finalize FY2011 goals [Aug 1-31]

Recommendation on position summary updates

- Position summaries [job specific R2A2s] and generic R2A2s should be reviewed annually
 - Need to update position summaries in cases where there is substantial change
 - Current position summary can be kept as an attachment in Taleo
 - Your previous job summary is available in pdf form from Debbie Tryforos or Kathy Webb
 - Attachments will only be visible by manager, so employee should keep a copy of the word file and a copy should be sent to Kathy Webb
- Plan
 - First discussion of changes at manager-employee performance review [June 15-July 7]
 - Interact with Division Head/PPA Management in unusual cases [July 8-31]
 - Manager and employee meet to finalize revised job summary [Aug 1-31]

Background information

- Taleo FAQ:
 - https://www-internal.slac.stanford.edu/hr/forms/TALEO_Perform_FAQ.doc
- Manager Quick Reference:
 - https://www-internal.slac.stanford.edu/hr/forms/Performance_Evaluation_Re
- Employee Quick Reference:
 - https://www-internal.slac.stanford.edu/hr/forms/Performance_eval__referenc
- TIP:
 - Remember to avoid the “back” button at all costs. Use the “Back to List”, “Back to Employee” or the “Cancel” links located on the top and/or bottom of the pages instead.