

Each calendar year, fixed term and continuing employees with a contract of 12 months or longer and those employed at the university for 12 months or longer will be subject to a performance review. As a supervisor of a professional or executive staff member, follow the below steps to complete the review in Workday. Please note, the process in Workday records the performance conversation between supervisor and team member. Please hold open conversation with your team members as they set their goals and the review process takes place each year.

People and Culture will trigger a task for all Professional and Executive staff to complete a goal setting task in the first quarter each year. A further task in the final quarter of the calendar year will be triggered for a performance review.

Once your team member/s complete their goal setting task, as a supervisor, you will receive a *Set Content* task to review and approve each team member's goals and proposed development items for that calendar year.

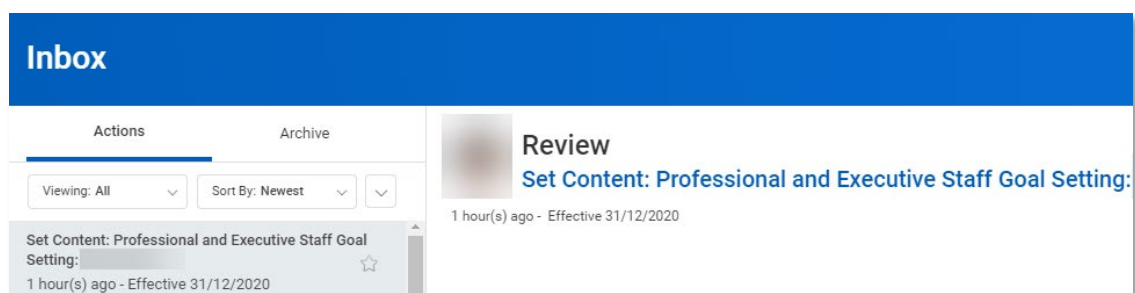
1. Professional and Executive Goal review

To complete the goal review for your team member, complete the following:

1.1 Open your inbox



1.2 Select the *Set Content: Professional and Executive Staff Goal Setting* task.



1.3 Read through the section for *Goals for the year ahead* as well as the *Training and Development Plan* items entered by your team member.

Review

Set Content: Professional and Executive Staff Goal Setting: Actions

1 hour(s) ago - Effective 31/12/2020

The Professional Performance and Development Review framework is designed to ensure an engaging focus on staff development and performance. The objectives of the goal setting process are to:

- Ensure alignment of agreed individual goals and priorities with the University and College/Portfolio goals and priorities
- Ensure performance embraces University Values
- Ensure staff capabilities are developed in line with agreed priorities
- Ensure opportunities to further develop skills are identified and actioned
- Provide a mechanism of monitoring performance and behaviours of staff with a view of continual improvement.

Goals for the Year Ahead

Goal *

Example goal

Relates To

Knowledge (Competency)

Category

Professional

Supports

Due Date

Status

Not Started

Training and Development Plan

Development Item *

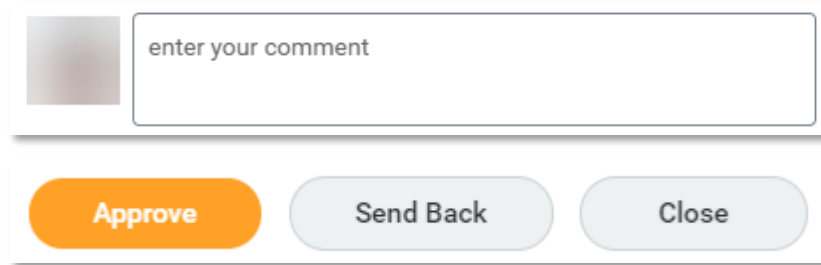
Example item

Additional Information

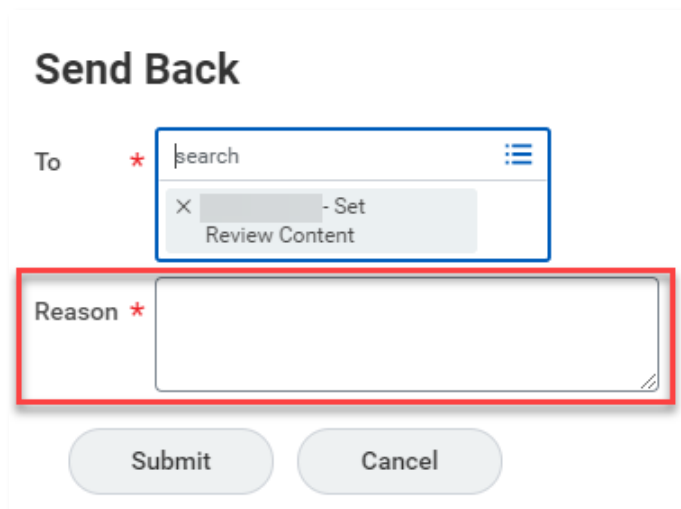
Relates To

Approve Send Back Close

1.3 cont.. If in agreeance with the goals and development items, add a comment and select *Approve*. If you do not agree or wish for further items to be entered or amendments made to entered items, select *Send Back*



A screenshot of a user interface showing a comment input field with the placeholder text "enter your comment". Below the input field are three buttons: "Approve" (orange), "Send Back" (grey), and "Close" (grey).



A screenshot of a "Send Back" dialog box. The title is "Send Back". Below the title is a "To" field with a red asterisk, containing a search bar and a dropdown menu with one item: "Set Review Content". Below the "To" field is a "Reason" field with a red asterisk, which is highlighted with a red border. At the bottom are "Submit" and "Cancel" buttons.

If you do *Send Back* the task to your team member, once your team member has completed the task again, it will come back to you for steps 1 – 3 to be completed.

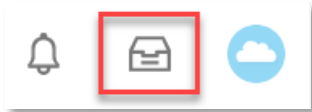
Once the Professional and Executive Staff Goal task/s are approved, there is no further action until People and Culture initiate the Professional and Executive Review process in the final quarter of the year.

2. Professional and Executive Performance Review

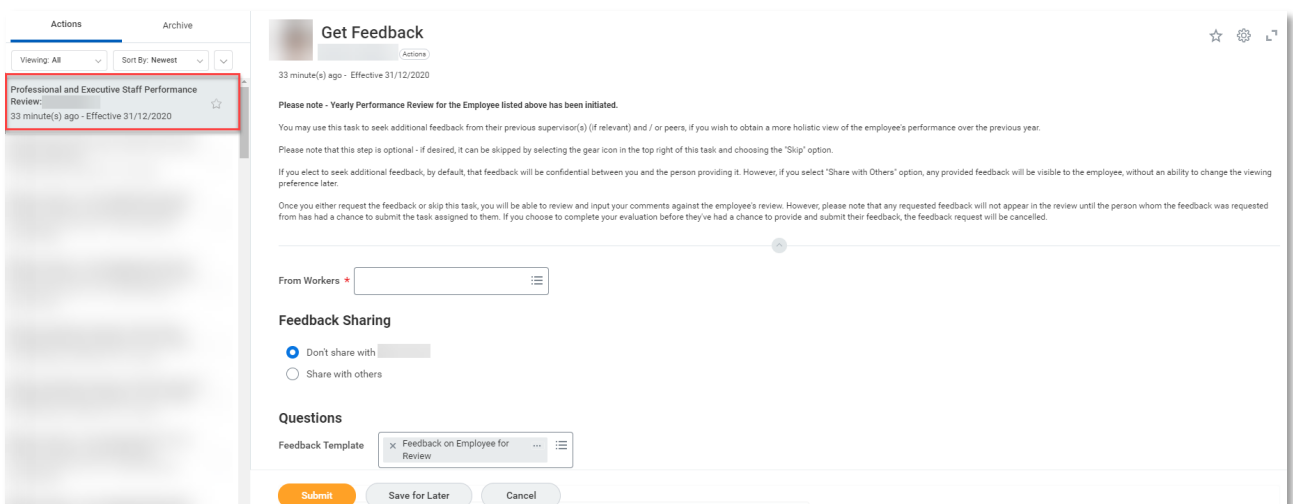
In the final quarter of each calendar year, People and Culture will initiate the Professional and Executive Review process. As a supervisor, this is when you are prompted to complete a discussion with each team member on their goals and development items created during the goal setting task and reflect on their performance throughout the year.

Each team member will first complete a self evaluation within Workday. Once they complete their task and submit it for your review, as a supervisor, you will first receive an option to seek further feedback on the employee by way of *Get Feedback* task.

2.1 Open your inbox



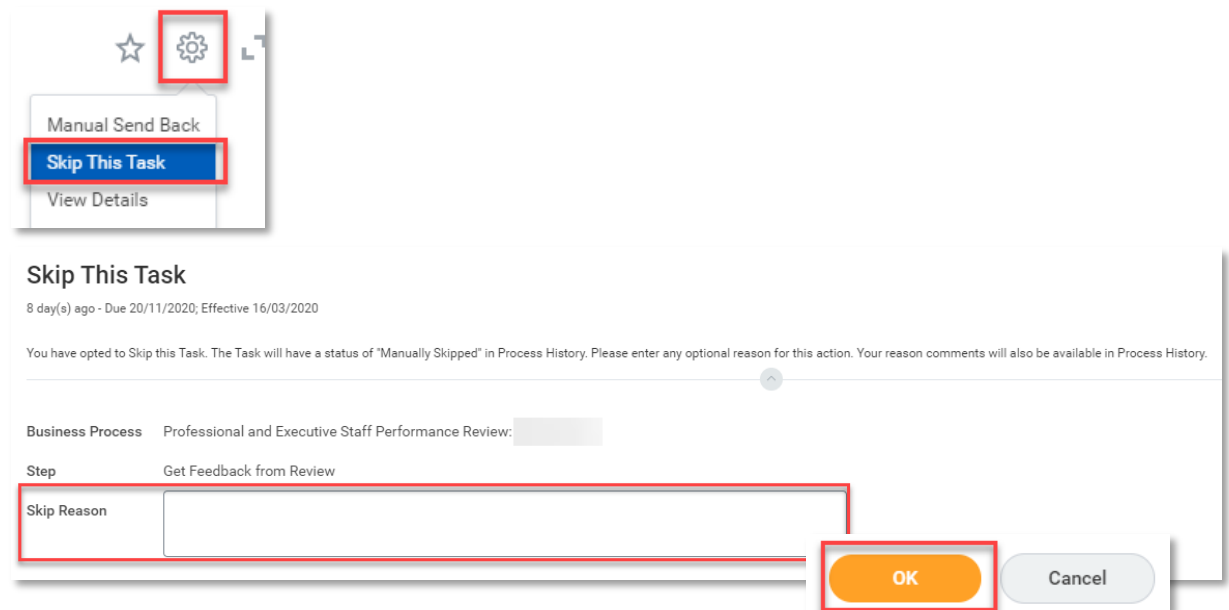
2.2 Select the *Professional and Executive Staff Performance Review* task. This is a *Get Feedback* task.



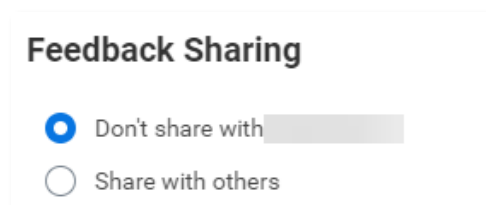
2.3 If you wish to seek additional feedback, in the *From Workers* field enter the name of the employee you wish to seek feedback from for your team member. This could be an old supervisor or peer(s) of the team member. As a supervisor, you are able to select any employee.



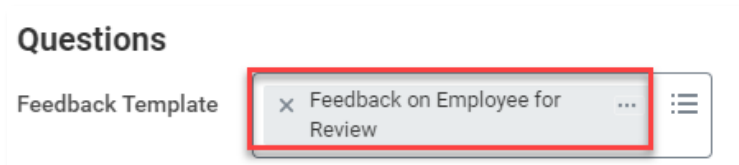
Should you not require feedback from another employee, you may skip this task. To do so, Click the settings wheel in the top right of the task and select *Skip this Task*. Add a *Skip Reason* and click *Ok*.



2.4 If you choose to seek feedback, select the *Feedback Sharing* option you require. Either, *Don't share with* the team member or, *Share with others* which allows the feedback to be known to the team member.

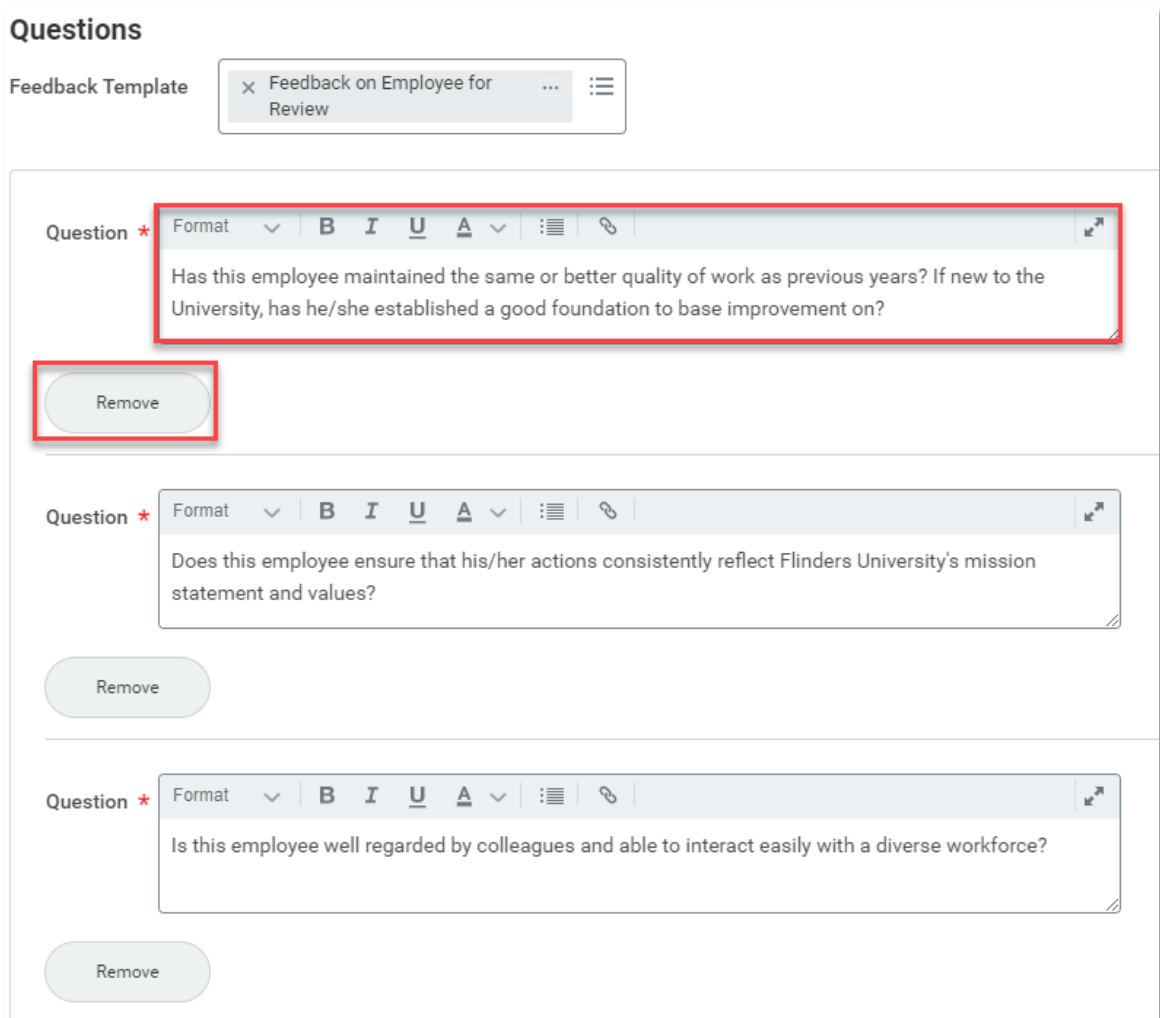


2.5 Under the *Questions* section, the *Feedback on Employee for Review* will pre-populate in the *Feedback Template* field.



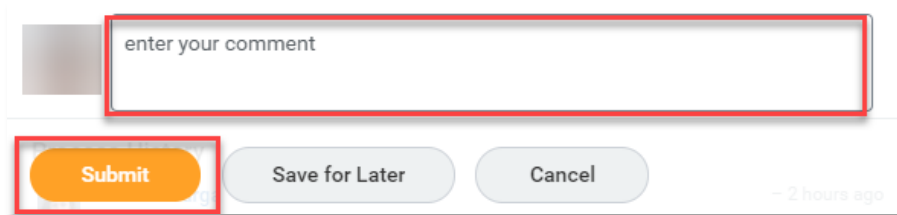
The screenshot shows a 'Questions' section with a 'Feedback Template' dropdown menu. The selected option is 'Feedback on Employee for Review', which is highlighted with a red rectangular box. To the right of the dropdown is a menu icon consisting of three horizontal lines.

2.6 The *Feedback on Employee for Review* template selected will populate a series of six questions. Edit, add or remove any question for the feedback as required.



The screenshot displays the 'Questions' section with three questions. Each question is contained within a text editor box with a red border. The first question is: 'Has this employee maintained the same or better quality of work as previous years? If new to the University, has he/she established a good foundation to base improvement on?'. Below it is a 'Remove' button, also highlighted with a red box. The second question is: 'Does this employee ensure that his/her actions consistently reflect Flinders University's mission statement and values?'. Below it is a 'Remove' button. The third question is: 'Is this employee well regarded by colleagues and able to interact easily with a diverse workforce?'. Below it is a 'Remove' button. Each question editor includes a 'Format' dropdown and icons for bold, italic, underline, text color, list, and link.

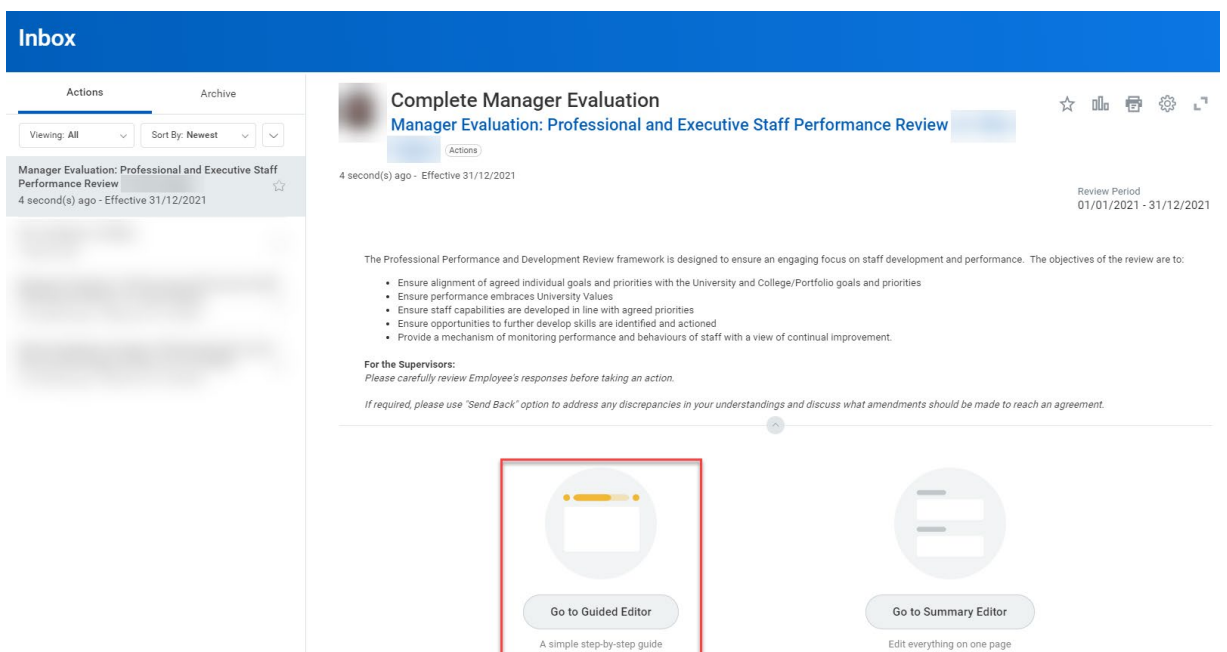
2.7 Enter any additional comments for the employee giving feedback and select *Submit*.



2.8 Once the *Get Feedback* task has been completed or skipped, you will receive a new task in your inbox, *Manager Evaluation: Professional and Executive Staff Performance Review*.

Please note, if you have requested feedback in the previous step but you choose to complete this next step before the feedback has been received, the feedback requests will be cancelled and will not be recorded. It is recommended to wait to complete this step until all feedback from the previous step has been received.

Click on *Go to Guided Editor*.



Inbox

Actions Archive

Viewing: All Sort By: Newest

Manager Evaluation: Professional and Executive Staff Performance Review
4 second(s) ago - Effective 31/12/2021

Complete Manager Evaluation
Manager Evaluation: Professional and Executive Staff Performance Review

4 second(s) ago - Effective 31/12/2021

Review Period
01/01/2021 - 31/12/2021

The Professional Performance and Development Review framework is designed to ensure an engaging focus on staff development and performance. The objectives of the review are to:

- Ensure alignment of agreed individual goals and priorities with the University and College/Portfolio goals and priorities
- Ensure performance embraces University Values
- Ensure staff capabilities are developed in line with agreed priorities
- Ensure opportunities to further develop skills are identified and actioned
- Provide a mechanism of monitoring performance and behaviours of staff with a view of continual improvement.

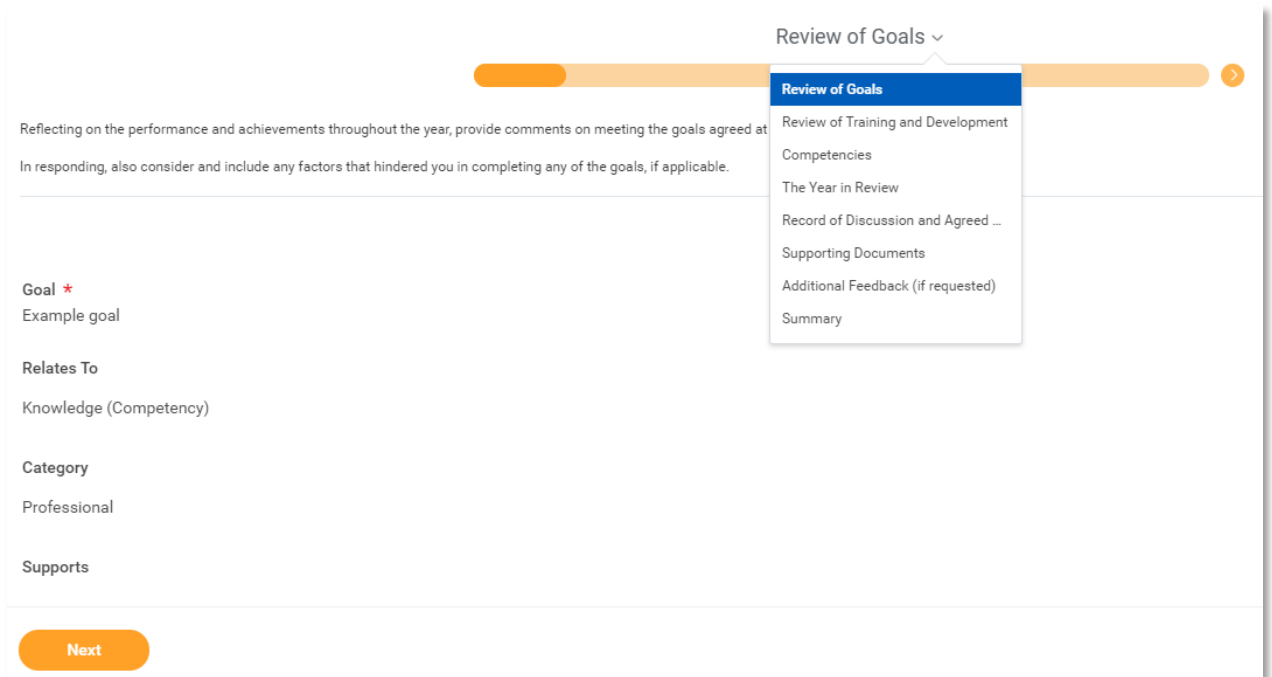
For the Supervisors:
Please carefully review Employee's responses before taking an action.

If required, please use "Send Back" option to address any discrepancies in your understandings and discuss what amendments should be made to reach an agreement.

Go to Guided Editor
A simple step-by-step guide

Go to Summary Editor
Edit everything on one page

2.9 Go through each section and review the information your team member has included. The first of these sections is *Review of Goals*. Add a *Manager Evaluation Comment* against each goal.



Review of Goals ▾

Review of Goals

Review of Training and Development

Competencies

The Year in Review

Record of Discussion and Agreed ...

Supporting Documents

Additional Feedback (if requested)

Summary

Reflecting on the performance and achievements throughout the year, provide comments on meeting the goals agreed at

In responding, also consider and include any factors that hindered you in completing any of the goals, if applicable.

Goal *

Example goal

Relates To

Knowledge (Competency)

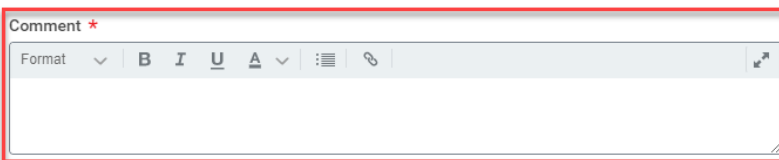
Category

Professional

Supports

Next

Manager Evaluation



Comment *

Format ▾ B I U A ▾ :☰ 🔗

Reminder: The review of the employee's self evaluation is the documentation of your review discussion on your employee's goals and development items prior to this task appearing in Workday.

Note: If there is a considerable discrepancy between the information the employee has provided and your understanding, please select "Send Back" from the summary page (refer step 2.25) and discuss with them what amendments should be made to reach an agreement.

2.10 Click *Next*.

Next

2.11 The next section is *Review of Training and Development*. Enter your *Manager Evaluation Comment* in the summary area.

Review of Training and Development ▾

Provide confirmation that the agreed development and training items have been completed or reasons why they could not be finished in the agreed timeframe.
For the Professional Development items, consider and provide comments on the benefits gained by you and / or your work area following the completion.

Development Item *

Example item

Additional Information

Relates To

Knowledge (Competency)

Status *

In Progress

Add

Summary

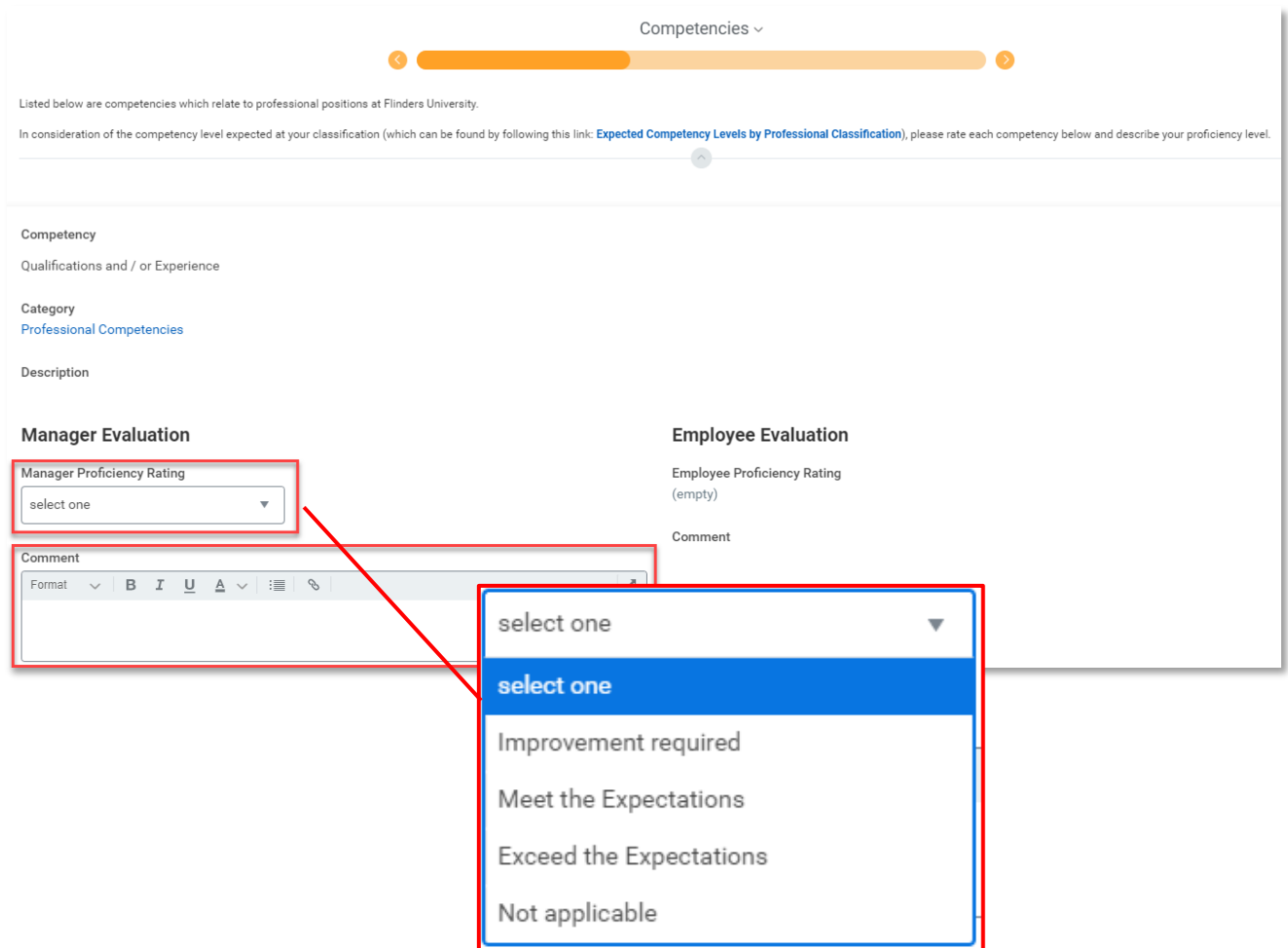
Manager Evaluation	Employee Evaluation
<p>Comment</p> <p>Format ▾ B <i>I</i> <u>U</u> ▲ ▾ ☰ 🔗</p> <p></p>	<p>Comment</p> <p>This development item is progressing well.</p>

Back Next

2.12 Click *Next*.



2.13 The next section is *Competencies*. Enter your *Manager Proficiency Rating* and *Comment* in each competency and the summary area.



Competencies ▾

Listed below are competencies which relate to professional positions at Flinders University.

In consideration of the competency level expected at your classification (which can be found by following this link: [Expected Competency Levels by Professional Classification](#)), please rate each competency below and describe your proficiency level.

Competency

Qualifications and / or Experience

Category
Professional Competencies

Description

Manager Evaluation

Manager Proficiency Rating
select one ▾

Comment

Format ▾ B I U A ▾ : ☰ 🔗

Employee Evaluation

Employee Proficiency Rating
(empty)

Comment

select one ▾

select one

Improvement required

Meet the Expectations

Exceed the Expectations

Not applicable

Note: The Competencies section is not mandatory for all professional and executive staff, therefore, it may be skipped if not relevant.

2.14 Click *Next*.



Back Next

2.15 The next section is *The Year in Review*. Enter your *Manager Evaluation Answer* for each question.

The Year in Review ▾

←

This section enables discussion and feedback on achievements and / or challenges affecting successful performance.
It is also the opportunity for the employee and supervisor to reflect on learnings and to provide two-way feedback.

Question
UNIVERSITY VALUES:
How have you demonstrated the University's Values in your day to day role?
Provide examples of specific behaviours that reflect the university values.

Manager Evaluation	Employee Evaluation
Answer *	Answer Example

Question
ACHIEVEMENTS:
Comment on major achievements in the last year and consider how they fit with the agreed goals set for the reporting period.

Manager Evaluation	Employee Evaluation
Answer *	Answer Example

Back Next

Manager Evaluation

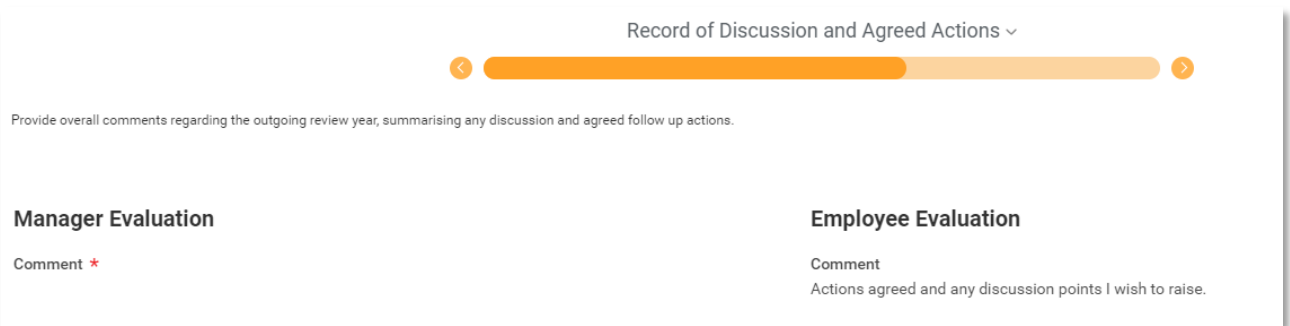
Answer *

Format ▾ | **B** | *I* | U | A ▾ | :☰ | 🔗 | ↗

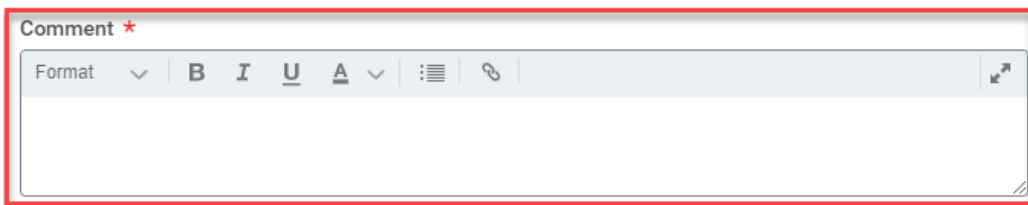
2.16 Click *Next*.

Back Next

2.17 The next section is *Record of Discussion and Agreed Actions*. Enter your *Manager Evaluation Comment* regarding the outgoing review year including any agreed follow up actions and a summary of the review discussion.



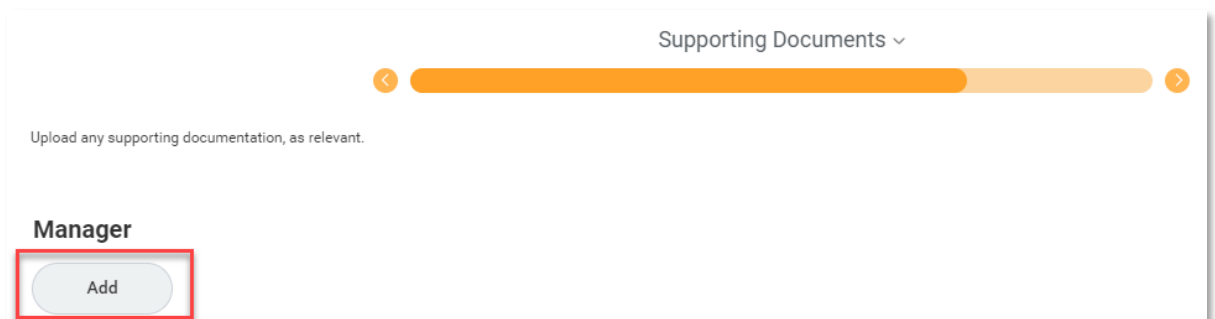
Manager Evaluation



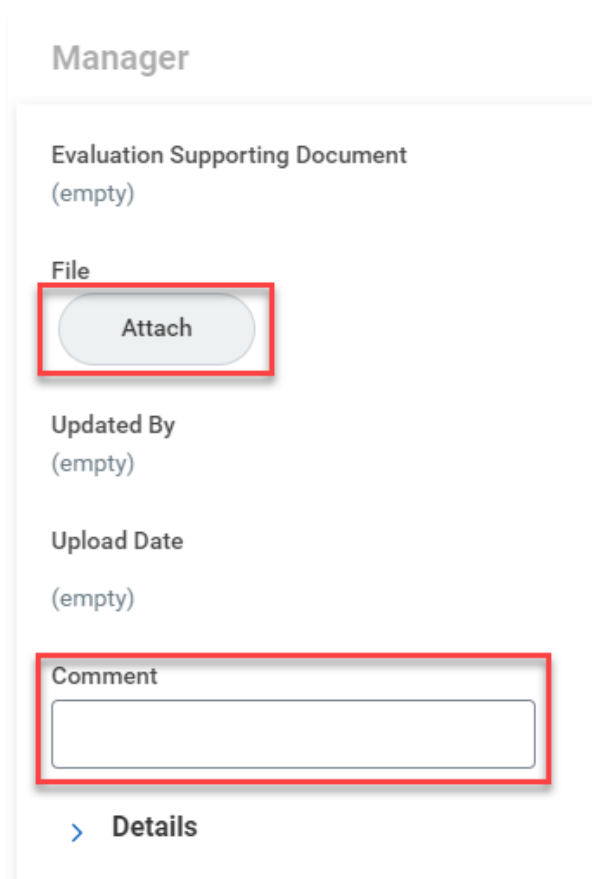
2.18 Click *Next*.



2.19 The next section is *Supporting Documents*. If, as a supervisor, you have documentation that supports the performance review click the *Add* icon.



2.20 Click *Attach* to add a document that is saved on your computer and add a *comment* as to what the document is. Repeat steps 2.19 and 2.20 until all relevant documentation has been uploaded.



Manager

Evaluation Supporting Document
(empty)

File

Attach

Updated By
(empty)

Upload Date
(empty)

Comment

> Details

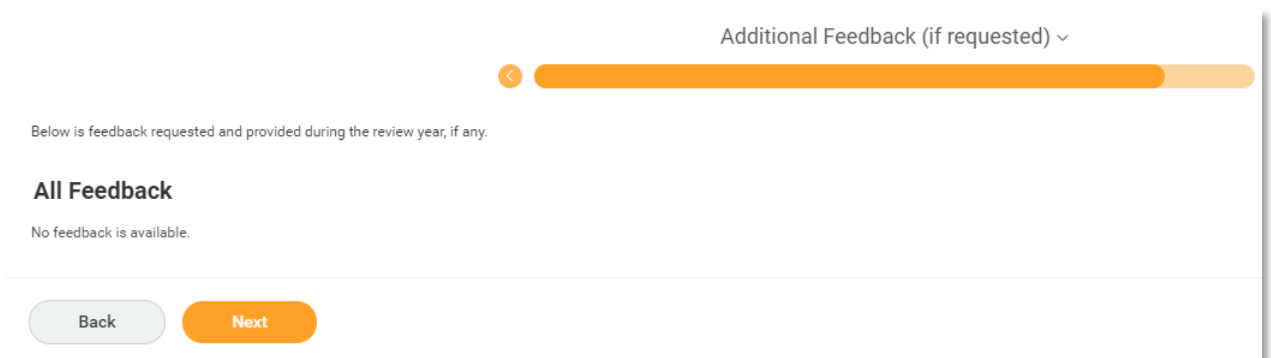
2.21 Click *Next*.



Back Next

2.22 The next section is *Additional Feedback (if requested)*. This section will show any feedback given to the employee by you, if requested by the employee, and / or any feedback received from other employees requested by you as the supervisor.

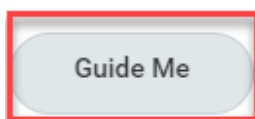
Review any feedback that has been provided and consider in your assessment of the employee's performance throughout the year.



2.23 Click *Next*.



2.24 The final section is the *Summary*. This screen (image next page) shows the information entered in all previous sections listed as a summary. Read through the summary to ensure all information entered is correct. If any section requires amendment, click on the *Guide Me* icon in the top right of the section. This will take you back to amend the information for that section. Then click *next* through to the summary screen again.



Complete Manager Evaluation

Manager Evaluation: Professional and Executive Staff Performance Review

4 second(s) ago - Effective 31/12/2021

Review Period
01/01/2021 - 31/12/2021

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For the Supervisors:
Please carefully review Employee's responses before taking an action.

If required, please use "Send Back" option to address any discrepancies in your understandings and discuss what amendments should be made to reach an agreement.

Review of Goals

Goal *
Goal 1

Relates To

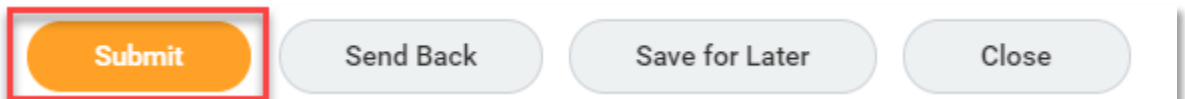
Category
Professional

Supports

Due Date

Submit Send Back Save for Later Close

2.25 Once updates are completed, click *Submit*.



If there is a need for your team member to amend any section, you can send the process back to them from this summary page. Select *Send Back* and, from the *To* field, choose the team member's name followed by - *Complete Self Evaluation* and, in the *Reason* field, enter details of what needs to be amended. The Manager evaluation task will then appear again in your inbox once amendments are completed.

Send Back

To * search

Reason * Complete Self Evaluation

Send Back

To * [Name] - Complete Self Evaluation

Reason * Please amend Goal 1 as discussed

Submit Cancel

2.26 Once the *Manager Evaluation* task is submitted, the Up Next task is with the team member to *Provide Employee Review Comments* and acknowledge the review.

Submitted
Manager Evaluation: Professional and Executive Staff Performance Review: [Redacted] (Actions)
 2 day(s) ago - Effective 31/12/2020

Up Next
 [Redacted]
[Provide Employee Review Comments](#)

> **Details and Process**

2.27 Once the employee acknowledgement task is submitted, as a supervisor, you will receive the final performance review task of *Manager Evaluation: Professional and Executive Staff Performance Review: Provide Manager Review Comments*.

Provide Manager Review Comments
Manager Evaluation: Professional and Executive Staff Performance Review: [Redacted] (Actions)

Evaluated By [Redacted]
 3 minute(s) ago - Effective 31/12/2020

In acknowledging this performance review, you confirm that you have read and understand the contents of this completed performance review.

Acknowledgement

Manager Acknowledgement	Employee Acknowledgement
Status *	Status
Comment	Acknowledge Review without Comments
	Comment

Select the *Status* as Acknowledge Review without or with comments. Add *Comments* if required.

Acknowledgement

Manager Acknowledgement

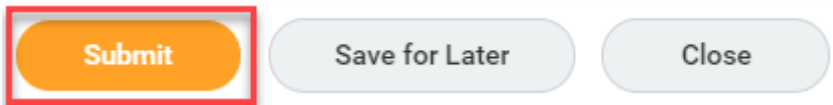
Status * [Dropdown menu]

Search [Search box]

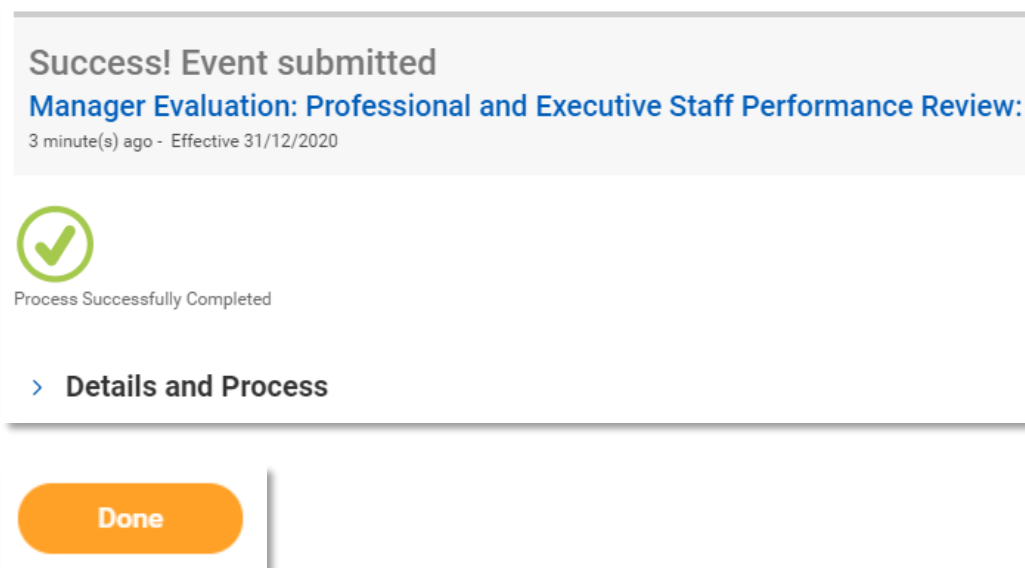
Comment

[Rich text editor with toolbar]

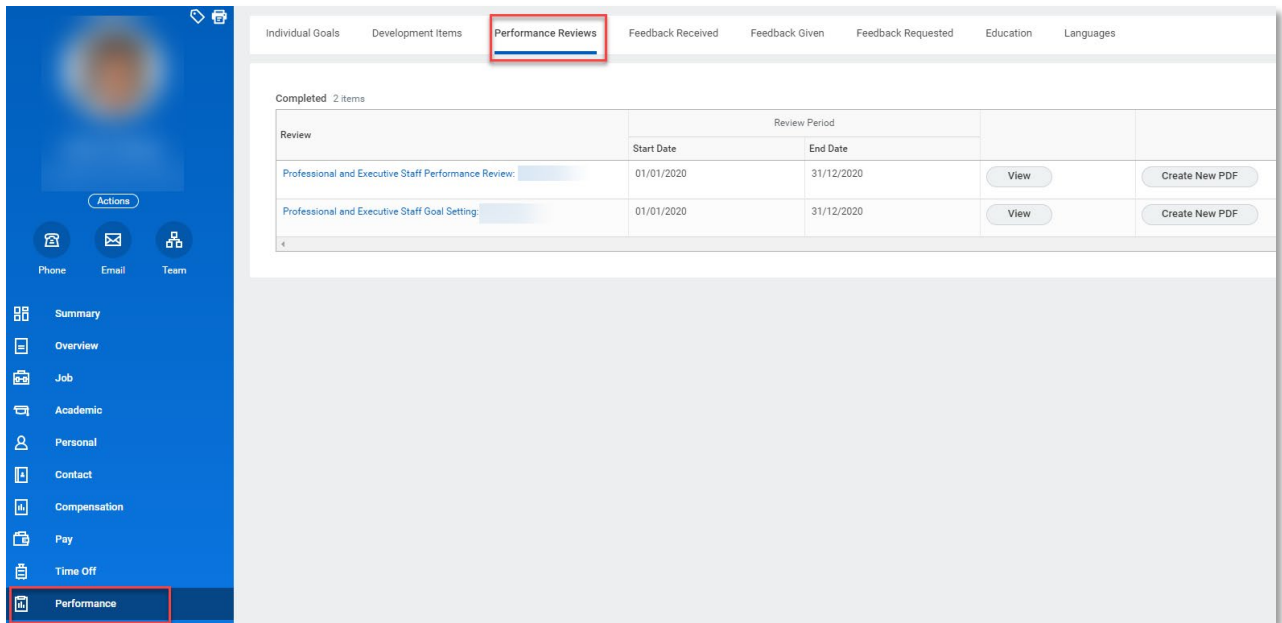
2.28 Click *Submit*.



2.29 The *Success! Event submitted* screen will appear. This ends the process for Professional and Executive Staff Performance Review. Click *Done*,



The Performance review information will sit in the Employee profile under *Performance and Performance Reviews*. See image next page.



The screenshot shows the Workday interface for Performance Reviews. The left sidebar contains navigation options: Summary, Overview, Job, Academic, Personal, Contact, Compensation, Pay, Time Off, and Performance (highlighted with a red box). The top navigation bar includes: Individual Goals, Development Items, Performance Reviews (highlighted with a red box), Feedback Received, Feedback Given, Feedback Requested, Education, and Languages. The main content area displays a table of completed reviews.

Review	Review Period		View	Create New PDF
	Start Date	End Date		
Professional and Executive Staff Performance Review: [redacted]	01/01/2020	31/12/2020	View	Create New PDF
Professional and Executive Staff Goal Setting: [redacted]	01/01/2020	31/12/2020	View	Create New PDF

This ends the process.