A large, multi-tiered stone sign for The University of Texas at San Antonio. The top tier is a glowing green cube with 'UTSA' in black. The middle tier is a larger stone block with 'THE UNIVERSITY OF TEXAS AT SAN ANTONIO' in black. The bottom tier is a smaller stone block with 'Main Campus' in black. The sign is set against a blue sky with white clouds and greenery.

Introduction to **Performance** **Management at UTSA**

Course Code SD 640

**THE
UNIVERSITY OF TEXAS
AT
SAN ANTONIO**

Main Campus

Resources – Go to Performance Management Website

People Excellence created a website dedicated to UTSA Performance Management

Check out Training resources under ‘Performance Management Training’ tab including 3 video recordings

www.utsa.edu/hr/performance-management

What is performance management?

What are we talking about?

Other similar terms:

- *Performance Review*
- *Annual Review*
- *Annual Appraisal*
- *Performance Evaluation*

Previous performance process at UTSA

- Primarily a paper based manual process
- February 1 through January 31
- The process varied across departments
- Focus on evaluating tasks and essential job functions
- Attributes section (Teamwork, adaptability, motivation, etc.)
- Not utilized for goal setting or development
- Rating scale
 - O = Outstanding
 - SP = Solid Performance
 - I = Improvement Needed



New performance management at UTSA

- New performance management initiated September 1, 2020
- Performance year is September 1 through August 31
- Goals, Core Values and Competencies
- New rating scale
- New platform (ePerformance in PeopleSoft)

Introduction to Performance Management at UTSA

What we'll cover in class today:

- Performance Management
- Features of UTSA's new Performance Management Process
- The ePerformance platform in PeopleSoft
- SMART Goals



Why is it important to have an effective performance management process?

- Communication, communication, communication
- Evaluate and set goals
- Clarify expectations
- Individuals can learn, advance, develop skills and abilities
- Ensure we are all contributing to the strategic success of the university
- Knowing if there is room to grow and move up
- The process assists in the decision-making for monetary rewards and promotions

Introduction to Performance Management at UTSA

REMINDER - What we'll cover in class today:

- Big picture view of the new process – the what, why, who, where, when
- The ePerformance platform in PeopleSoft
- Developing SMART Goals

Let's take a look at the new aspects to performance management

5 'W's of the new performance management at UTSA

- What **What is the process?**
- Why **Why are we changing?**
- Who **Who is involved?**
- Where **Where will the new process be housed?**
- When **When are the important timelines and deadlines?**

The 'What'

- Managing performance for UTSA
- A helpful tool to use throughout the year
- For employees, managers and HR administrators
- Based on Goals, Core Values, Competencies
- Promotes planning, collaboration, communication, assessment, monitoring
- Two purposes:
 1. Performance evaluation
 2. Development evaluation

Performance & Development

Performance evaluation

- Assessment and review of an employee's past performance
- Ratings
- Monetary Rewards
- Promotions
- Career advancement opportunities

Development evaluation

- As a result of the performance evaluation
- Plans for the future
- Training plans
- Certifications
- Growth, expansion, improvements

The 'Why'

- Update, improve, modernize
- ePerformance is offered at no additional charge by UTSysystem
- Focus on both evaluation and development
- New improved systems (reports, tracking, upload documents, historical perspective)
- Strategic success for UTSA



The 'Who'

Who*	Description
Individual Contributors (IC)	Anyone in non-supervisory roles and/or those who only have student direct reports
People Leaders (PL)	Anyone with direct reports and is in a Senior Director and below title
Executives (EX)	Individuals with titles of Executive Director, Assistant Dean, AVP, Vice Provost and above

* Does not include Faculty (tenured/tenure-track/non-tenure/adjunct)












The 'Where'

UTShare/PeopleSoft
ePerformance
platform

Employee Self
Service

[Manager Self
Service]

Employee Self Service

Financial Approvals  0	HRMS Approvals  0	UTSA Announcements	
My Reports 	UTSA Staff Careers 	Payroll and Compensation 	Personal Details 
Talent Profile 	Performance  Next Due Date 10/31/2020	Time and Attendance 	Benefits Summary 
UTSA Business Solutions Center 			

The 'When' of the Performance Management process

When?	What happens?	Who does it?
September – October timeframe	Define and write GOALS	Employee and Manager together
Mid- to Late-October (at the latest)	Enter GOALS into ePerformance in PeopleSoft	Employee
By October 31 (this year only, Nov. 7)	Approve GOALS	Manager
Throughout the year	Monitor, evaluate, communicate, enter information, upload documents	Both Employee and Manager
February – March timeframe	Mid-Year Check-in	Both Employee and Manager
By August 31 st	Complete a SELF-EVALUATION	Employee
Early September	Complete performance evaluation on the employee	Manager
Early- to Mid-September	One-on-one meeting to discuss	Employee and Manager together
Late September	Acknowledge receipt of the evaluation; employee may include comments	Employee
September 30 th deadline	Complete performance evaluation	Manager with Next Level Manager

Re-Cap of the 5 'W's of UTSA's new performance management

- **What? New process, New criteria, New online platform**
- **Why? To improve, modernize, use as a tool**
- **Who? All of us will participate**
- **Where? PeopleSoft ePerformance Platform**
- **When? September 1 to August 31, various steps along the way**

What questions do you have?

Four new aspects to UTSA's Performance Management

#1. Goals

#2. Core Values

#3. Competencies

#4. New rating scale

1. Goals

- All employees will develop goals at the beginning of the performance year
- Goals will be based on the SMART model
 Specific, Measurable, Attainable, Relevant, Time-based
- Goals will be entered into the ePerformance platform in PeopleSoft
- Some more strategic, some more task oriented
- The rating will be 'Goal Achieved' or 'Goal Not Achieved'

In this training we'll cover SMART goals in detail

#2. Core Values

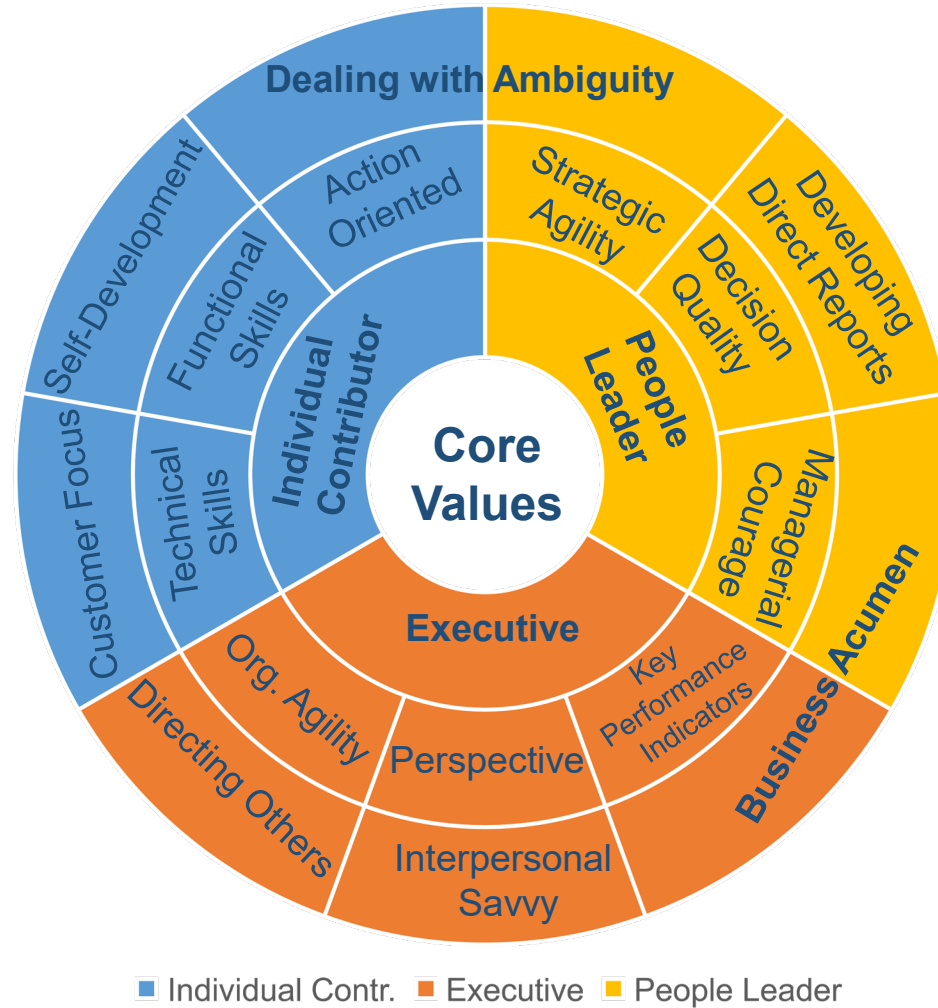
UTSA's Core Values are the foundation of all that we do. They guide UTSA to be a model for student success, to be a great public research university and an exemplar for strategic growth and innovative excellence. As part of the new performance process, employees will be rated on their ability to practice and promote UTSA's core values.

Core Values – ***What are UTSA's Core Values? (hint: there are 6 of them)***

- **Integrity**
- **Excellence**
- **Inclusiveness**
- **Respect**
- **Collaboration**
- **Innovation**

#3. Competency-based model

Demonstrable characteristics and skills that enable people to deliver superior performance in a given job, role, or situation.



A person gains competency through education, training, experience, and natural abilities.

Competencies by group

Individual Contributor

1. Customer Focus
2. Functional skills
3. Technical skills
4. Action-Oriented
5. Dealing with Ambiguity
6. Self-Development

People Leader

1. Decision Quality
2. Business Acumen
3. Strategic Agility
4. Managerial Courage
5. Dealing with Ambiguity
6. Developing Direct Reports

Executive

1. Organizational Agility
2. Business Acumen
3. Perspective
4. Interpersonal Savvy
5. Directing others
6. Key Performance Indicators (KPIs)

#4. New Rating Scale for Core Values & Competencies

1 – Does Not Meet Expectations	No behavioral indicators listed were met
2 – Somewhat Meets Expectations	Some of the behavioral indicators listed were met
3 – Meets Expectations	Most of the behavioral indicators listed were met
4 – Exceeds Expectations	Most or all of the behavioral indicators listed were met
5 – Role Model	All of the behavioral indicators listed were met or exceeded

Competency Example (IC and PL) - Description

Dealing with Ambiguity

Can effectively cope with change; can shift gears comfortably; can decide and act without having the total picture; isn't upset when things are up in the air; doesn't have to finish things before moving on; can comfortably handle change.

Rating Scale Example – Dealing with Ambiguity

Rating #	Rating Description	Details
1	Does Not Meet Expectations	Was resistant to change; rarely sought opportunities to provide a different perspective; had difficulty making decisions or executing without the full picture
2	Somewhat Meets Expectations	Was able to maneuver through changing situations and ambiguity with guidance and supervision; sometimes required additional information to move forward
3	Meets Expectation	Was comfortable with change and was able to adapt to changing situations; was able to perform tasks in an ambiguous environment with some supervision and guidance
4	Exceeds Expectations	Was comfortable with change and exhibited adaptability in both changing and ambiguous environments; required little to no guidance to move forward
5	Role Model	Embraced change and influenced others in the change process; acted as a change agent in the organization; flawlessly executed in an ambiguous environment with little to no guidance

Notes on the new rating scale

- A manager using either a rating of 1 or 5 is required to provide justification for these ratings
- The PeopleSoft ePerformance platform allows both employees and managers to upload attachments as examples
- Employees and managers are able to add comments to each rating
- Employees have the opportunity at the end of the process to comment, especially if they disagree with any of the manager's ratings

Introduction to ePerformance In PeopleSoft



ePerformance in PeopleSoft

- Enter your goals at the start of the performance year
- Complete your self-evaluation at the end of the performance year
- Use ePerformance as a tool throughout the year

- This presentation will cover:
 - How to login to ePerformance in PeopleSoft
 - How to enter Goals
 - How to access the Self-Evaluation portal



Accessing ePerformance in PeopleSoft

<https://my.utshare.utsystem.edu>



Select your home institution

UT Share requires that you authenticate with your home institution. Please either select it from the list below, then click 'Select', or you may use the search-as-you-type feature by typing a partial name into the search box below, then clicking 'Search'.

Please do not create a bookmark or favorite in your web browser on this page. This page is not part of the application you are accessing. You may create a bookmark/favorite after you complete the authentication process.

Enter organization name (partials ok):

Or choose from a list:

The University of Texas at San Antonio Remember for session

Need assistance?

Send email to your local help desk with a description of the problem: University of Texas at Arlington



The University of Texas at San Antonio™

Login to
my.utshare.utsystem.edu

myUTSA ID

xlg889

Password

.....

Login

- > [Forgot your password?](#)
- > [Need Help?](#)
- > [Acceptable Use Policy](#)

For security reasons, please exit your Web browser and/or log out completely when you are done accessing services that require authentication, especially if you are using a public computer or kiosk.

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[Add a new device](#)

[My Settings & Devices](#)

[Need help?](#)

Powered by Duo Security

Choose an authentication method



Duo Push Used automatically

Send Me a Push



Call Me

Call Me



Passcode

Enter a Passcode












Pushed a login request to your device...

Cancel

UTShare/PeopleSoft ePerformance platform

Employee Self Service

Employee Self Service

Financial Approvals  0	HRMS Approvals  0	UTSA Announcements	
My Reports 	UTSA Staff Careers 	Payroll and Compensation 	Personal Details 
Talent Profile 	Performance  Next Due Date 10/31/2020	Time and Attendance 	Benefits Summary 
UTSA Business Solutions Center 			

Steps to enter goals

Employee Self Service Performance

Employee Name
TRAINER & INSTRUCTIONAL DESIGN

- My Current Documents** (1)
- My Historical Documents
- Evaluations of Others (0)
- Historical Evaluations of Others

My Current Documents

Document Type	Document Status	Period Begin / Period End	Next Due Date
UTSA Performance Evaluation	Define Criteria	09/01/2020 08/31/2021	10/31/2020 >

Steps to enter goals

Performance Process Performance Process Save

Steps and Tasks

- Employee Name
UTSA Performance Evaluation
09/01/2020 - 08/31/2021 [Overview](#)
- Goal Setting**
Due Date 10/31/2020
Update
- Complete Self Evaluation
Due Date 09/14/2021
- Review Manager Evaluation
Due Date 10/15/2021

UTSA Performance Evaluation

Define Criteria - Update

[Print](#) | [Notify](#) | [Export](#)

Employee Name	Job Title	TRAINER & INSTRUCTIONAL DESIGN	Manager	Manager Name
Document Type	UTSA Performance Evaluation	Period	09/01/2020 - 08/31/2021	
Template	Individual Contributor: FY2021	Document ID	10727	
Status	In Progress	Due Date	10/31/2020	

1. Add the performance criteria (goals and/or responsibilities) that you plan to accomplish during the performance period.
2. Once you have completed this step select the notify button to email your manager.

▼ Section 1 - Goals

Add Item

▼ Audit History

Steps to enter goals

Performance Performance Process

Performance Process ⚙️ ⏪

Steps and Tasks 🔄 ⋮

Employee Name
UTSA Performance Evaluation
09/01/2020 - 08/31/2021 [Overview](#)

▼ **Goal Setting**
Due Date 10/31/2020
Update

▶ **Complete Self Evaluation**
Due Date 09/14/2021

▶ **Review Manager Evaluation**
Due Date 10/15/2021

UTSA Performance Evaluation

Add Item

- Add pre-defined item
- Add your own Item
- Copy item from Manager Document
- Copy Item from My Documents

Next

[Return](#)

Performance Process



UTSA Performance Evaluation

Steps and Tasks



Add Your Own Item

Employee Name

UTSA Performance Evaluation
09/01/2020 - 08/31/2021

[Overview](#)

Goal Setting

Due Date 10/31/2020

[Update](#)

Complete Self Evaluation

Due Date 09/14/2021

Review Manager Evaluation

Due Date 10/15/2021

*Title

Description

Rich text editor toolbar with icons for undo, redo, font, size, bold, italic, underline, bulleted list, numbered list, link, unlink, and table.

Large empty text area for entering the description of the goal.

Measurement

Rich text editor toolbar with icons for undo, redo, font, size, bold, italic, underline, bulleted list, numbered list, link, unlink, and table.

Large empty text area for entering the measurement details of the goal.

Due Date

(example 12/31/2000)

Reminder Date

(example 12/31/2000)

Start Date

End Date

Four calendar date pickers for Due Date, Reminder Date, Start Date, and End Date.

- Critical
- Stretch Goal

Add

[Return](#)

For more training materials on SMART goals: www.utsa.edu/hr/performance-management

Employee Name
UTSA Performance Evaluation
09/01/2020 - 08/31/2021 Overview

- 📌 Goal Setting
Due Date 10/31/2020
📌 Update
- ▶️ Complete Self Evaluation
Due Date 09/14/2021
- ▶️ Review Manager Evaluation
Due Date 10/15/2021

*Title Articulate Storyline Online Learning Module

Description
Learn Articulate Storyline software in order to develop online learning and create from scratch at least one new online learning module for UTSA employees by the end of August 2021.

Measurement
The creation of one new online learning module, effective and well received by UTSA employees

Due Date 08/31/2021 (example 12/31/2000)
Reminder Date 12/15/2020 (example 12/31/2000)
Start Date 09/01/2020
End Date 08/31/2021

Critical
 Stretch Goal

Add

[Return](#)

SMART goals

- Specific
- Measurable
- Achievable
- Relevant
- Time-based

Go to www.utsa.edu/hr/performance-management for more training materials about SMART goals

Steps to enter goals

Performance Process UTSA Performance Evaluation Save

Steps and Tasks

Employee Name
UTSA Performance Evaluation
09/01/2020 - 08/31/2021 [Overview](#)

Goal Setting
Due Date 10/31/2020
Update

Complete Self Evaluation
Due Date 09/14/2021

Review Manager Evaluation
Due Date 10/15/2021

Define Criteria - Update

Employee Name

Job Title	TRAINER & INSTRUCTIONAL DESIGN	Manager	Manager Name
Document Type	UTSA Performance Evaluation	Period	09/01/2020 - 08/31/2021
Template	Individual Contributor: FY2021	Document ID	10727
Status	In Progress	Due Date	10/31/2020

1. Add the performance criteria (goals and/or responsibilities) that you plan to accomplish during the performance period.
2. Once you have completed this step select the notify button to email your manager.

Section 1 - Goals

[Expand](#) | [Collapse](#) | [Add Item](#)

Articulate Storyline Online Learning Module

Description: Learn Articulate Storyline software in order to develop online learning and create from scratch at least one new online learning module for UTSA employees by the end of August 2021. ✎ 🗑

Measurement: The creation of one new online learning module, effective and well received by UTSA employees

- Reminder Date : 12/15/2020
- Due Date : 08/31/2021
- Critical: No
- Stretch Goal: No
- Start Date : 09/01/2020
- End Date : 08/31/2021

[Print](#) | [Notify](#) | [Export](#)

Steps to enter goals

Performance **Performance Process**

Performance Process ⚙️ <<

Steps and Tasks 🔄 ⋮

Employee Name
UTSA Performance Evaluation
09/01/2020 - 08/31/2021 [Overview](#)

📌 **Goal Setting**
Due Date 10/31/2020
Update

📌 **Complete Self Evaluation**
Due Date 09/14/2021

📌 **Review Manager Evaluation**
Due Date 10/15/2021

Please enter your email message and select the the send button.

To 📎



Subject This is a notification regarding the UTSA Performance Evaluation for Employee Name

Message Text

254 characters remaining

Send **Cancel**

Self-Evaluation Portal

Performance Process  

Steps and Tasks  

Employee Name
UTSA Performance Evaluation
09/01/2020 - 08/31/2021 [Overview](#)

[Goal Setting](#)
Due Date 10/31/2020

[Complete Self Evaluation](#)
Due Date 09/14/2021
 [Update and Complete](#)

[Review Manager Evaluation](#)
Due Date 10/15/2021

UTSA Performance Evaluation

Self-Evaluation - Update and Complete

Employee Name

Job Title TRAINER & INSTRUCTIONAL DESIGN

Manager Manager Name

Document Type UTSA Performance Evaluation

Period 09/01/2020 - 08/31/2021

Template Individual Contributor: FY2021

Document ID 10258

Status Evaluation in Progress

Due Date 09/14/2021

Enter your ratings and comments for each applicable section and save. When you have finished updating your evaluation select the **Complete** button to save your changes and send this document to your manager for review.

 [Calculate All Ratings](#)

Goals

Core Values

Operation Excellence

Personal Growth

Summary

▼ Section 1 - Goals

Provide the final status of the goal and any applicable comments.

Expand | Collapse

▶ **Articulate Storyline**

Attachments

No Attachments have been added to this document

 [Add Attachment](#)



▼ Audit History

Save

Complete

 Print |  Notify |  Export

Self-Evaluation Portal

Performance Process  

Steps and Tasks  

Employee Name
UTSA Performance Evaluation
09/01/2020 - 08/31/2021 [Overview](#)

[Goal Setting](#)
Due Date 10/31/2020

[Complete Self Evaluation](#)
Due Date 09/14/2021
 [Update and Complete](#)

[Review Manager Evaluation](#)
Due Date 10/15/2021

UTSA Performance Evaluation

Self-Evaluation - Update and Complete

Employee Name

Job Title TRAINER & INSTRUCTIONAL DESIGN

Manager Manager Name

Document Type UTSA Performance Evaluation

Period 09/01/2020 - 08/31/2021

Template Individual Contributor: FY2021

Document ID 10258

Status Evaluation in Progress

Due Date 09/14/2021

Enter your ratings and comments for each applicable section and save. When you have finished updating your evaluation select the **Complete** button to save your changes and send this document to your manager for review.

 [Calculate All Ratings](#)

Goals

Core Values

Operation Excellence

Personal Growth

Summary

▼ Section 1 - Goals

Provide the final status of the goal and any applicable comments.

[Expand](#) | [Collapse](#)

▶ **Articulate Storyline**

Attachments

No Attachments have been added to this document

 [Add Attachment](#)

▼ Audit History

[Save](#)

[Complete](#)

 [Print](#) |  [Notify](#) |  [Export](#)

Self-Evaluation - Goals

Self-Evaluation - Update and Complete

[Print](#) | [Notify](#) | [Export](#)

▼ Articulate Storyline Online Learning Module

Description : Learn Articulate Storyline software in order to develop online learning and create from scratch at least one new online learning module for UTSA employees by the end of August 2021.

Measurement : The creation of one new online learning module, effective and well received by UTSA employees

- Reminder Date : 12/15/2020
- Due Date : 08/31/2021
- Critical: No
- Stretch Goal: No
- Start Date : 09/01/2020
- End Date : 08/31/2021

Employee Rating

Employee Comments

Rich text editor toolbar with icons for undo, redo, font color, size, bold, italic, underline, bulleted list, numbered list, link, unlink, and table.

Large empty text area for entering employee comments.

Created By Employee Name 9/23/2020 2:19PM

Attachments

No Attachments have been added to this document

[+](#) Add Attachment

Self-Evaluation – Core Values

Self-Evaluation - Update and Complete

[Goals](#)[Core Values](#)[Operation Excellence](#)[Personal Growth](#)[Summary](#)

▼ Section 2 - Core Values

We encourage an environment of dialogue and discovery, where integrity, excellence, inclusiveness, respect, collaboration and innovation are fostered. UTSA's core values reflect how we, as employees, have pursued this plan as well as how we will fulfill our mission and realize our vision.

[Expand](#) | [Collapse](#)

▶ Integrity

▶ Excellence

▶ Inclusiveness

▶ Respect

▶ Collaboration

▶ Innovation

[Core Values Summary](#)

Self-Evaluation – Core Values

Integrity

Description : Adhering to a standard of core values at UTSA and ensuring that one acts in a fair and ethical fashion.

Employee Rating

0.00



Employee Comments

Rich text editor toolbar with icons for undo, redo, font, size, bold, italic, underline, bulleted list, numbered list, link, unlink, and table. Below the toolbar is a large empty text area for comments.

Attachments

No Attachments have been added to this document



Add Attachment

Self-Evaluation – Core Values - Integrity

Proficiencies

	Rating	Numeric Rating	Description
<input type="radio"/>	1. Does Not Meet Expectations	1.00	Consistently fails to apply the appropriate laws, regulations, and University policies. Does not practice confidentiality and fails to accurately determine ethical dilemmas and conflicts of interest, resulting in the University assuming an unnecessary risk.
<input type="radio"/>	2. Somewhat Meets Expectations	2.00	Inconsistent in application and adherence to the appropriate laws, regulations, and University policies. Does not practice the expected standard of confidentiality. May not accurately determine ethical dilemmas and conflicts of interest, resulting in increased risk for the University.
<input type="radio"/>	3. Meets Expectations	3.00	Complies with all appropriate laws, regulations, and University policies in performance of his or her job responsibilities. Practices confidentiality and meets the expected standard of behavior to identify ethical dilemmas and conflicts of interest in effort to mitigate risk.
<input type="radio"/>	4. Exceed Expectations	4.00	Maintains confidentiality, stewards University resources with integrity. Works to ensure compliance related to performing his or her job responsibilities. Identifies and addresses ethical dilemmas and conflicts of interest to mitigate risk.
<input type="radio"/>	5. Role Model	5.00	Models and leads by example in the stewardship of University resources. Actively works to consider issues of compliance and confidentiality as it relates to the performance of his or her responsibilities and identify ethical dilemmas and conflicts of interest, taking action to avoid or prevent them.

Select Proficiency

Self-Evaluation – Operational Excellence

Self-Evaluation - Update and Complete

Enter your ratings and comments for each applicable section and save. When you have finished updating your evaluation select the Complete button to save your changes and send this document to your manager for review.

 [Calculate All Ratings](#)

Goals Core Values **Operation Excellence** Personal Growth Summary



▼ Section 3 - Operational Excellence

A philosophy of the workplace where problem-solving and teamwork results in the ongoing improvement in an organization. The process involves focusing on the customers' needs and continually improving the current activities in the workplace.

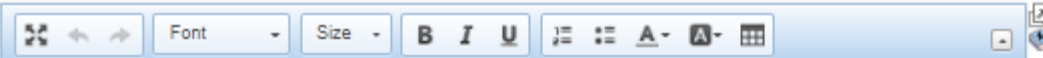
▾ Expand | ▸ Collapse

- ▶ Customer Focus
- ▶ Dealing with Ambiguity
- ▶ Functional/Technical Skills
- ▶ Action Oriented

Operational Excellence Summary

Employee Rating 0.00  

Comments



Self-Evaluation – Operational Excellence

Self-Evaluation - Update and Complete

Enter your ratings and comments for each applicable section and save. When you have finished updating your evaluation select the Complete button to save your changes and send this document to your manager for review.

 [Calculate All Ratings](#)

Goals

Core Values

Operation Excellence

Personal Growth

Summary

▼ Section 3 - Operational Excellence

A philosophy of the workplace where problem-solving and teamwork results in the ongoing improvement in an organization. The process involves focusing on the customers' needs and continually improving the current activities in the workplace.

[Expand](#) | [Collapse](#)

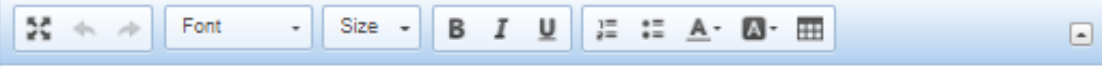
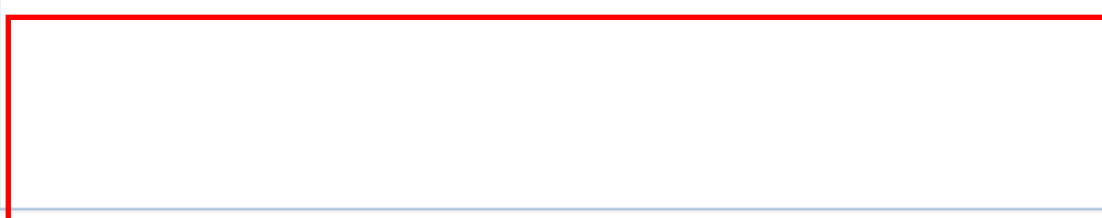
▼ Customer Focus

Description : Dedicated to meeting the expectations and requirements of internal and external customers; gets first-hand customer information and uses it for improvements in products and services; acts with customers in mind; establishes and maintains effective relationships with customers and gains their trust and respect.

Employee Rating

0.00 

Employee Comments

Self-Evaluation – Operational Excellence – Customer Focus

Proficiencies

	Rating	Numeric Rating	Description
<input type="radio"/>	1. Does Not Meet Expectations	1.00	Rarely placed students/customers needs above own; rarely participated in community/volunteer events.
<input type="radio"/>	2. Somewhat Meets Expectations	2.00	With coaching and encouragement, placed students/customers needs above their own. May have participated in community/volunteer events.
<input type="radio"/>	3. Meets Expectations	3.00	Was able to gain the trust and respect of students/customers; establishes and maintained effective relationships with students/customers.
<input type="radio"/>	4. Exceed Expectations	4.00	Exhibited selfless service; took initiative to celebrate student/customer success, while putting the needs of others above their own; maintained trusting and respectful relationships with students/customers. Volunteered in established community/volunteer events.
<input type="radio"/>	5. Role Model	5.00	The epitome of selfless service; sought insights into the student/customer experience, looked for ways to make improvements and bring forth ideas; developed a reputation of respect and trustworthiness. Sought new ways to contribute and give back to the community.

Select Proficiency

Self-Evaluation – Personal Growth

Self-Evaluation - Update and Complete

Employee Name

Job Title	TRAINER & INSTRUCTIONAL DESIGN	Manager	Manager Name
Document Type	UTSA Performance Evaluation	Period	09/01/2020 - 08/31/2021
Template	Individual Contributor: FY2021	Document ID	10727
Status	Evaluation in Progress	Due Date	09/14/2021

Enter your ratings and comments for each applicable section and save. When you have finished updating your evaluation select the Complete button to save your changes and send this document to your manager for review.

 Calculate All Ratings

Goals Core Values Operation Excellence **Personal Growth** Summary

▼ Section 4 - Personal Growth

Personal growth is the ongoing process of understanding and developing oneself in order to achieve one's fullest potential.

 Expand |  Collapse

▼ Self Development

Description : Is personally committed to and actively works to continuously improve him/herself; understands that different situations and levels may call for different skills and approaches; works to deploy strengths; works on compensating for weakness and limits.

Employee Rating 

Employee Comments



Self-Evaluation – Personal Growth

Proficiencies

	Rating	Numeric Rating	Description
<input type="radio"/>	1. Does Not Meet Expectations	1.00	Rarely participated in learning or career development unless required. Was unwilling to work on projects unfamiliar or outside of their comfort zone or regular area of focus. Refused to consider incorporating new skills or knowledge into
<input type="radio"/>	2. Somewhat Meets Expectations	2.00	Participated in formal and on the job learning or career development opportunities if asked. Rarely looked for/ takes on new tasks to build skills. Had shown resistance to incorporating new skills or knowledge into current work style.
<input type="radio"/>	3. Meets Expectations	3.00	Participated in formal and on the job learning or career development opportunities when asked. Utilized current skills and knowledge to perform job responsibilities. Was receptive to ways in which he or she can incorporate new skills or knowledge learned into their work.
<input type="radio"/>	4. Exceed Expectations	4.00	Actively participated in formal and on the job learning or career development opportunities. Was willing to take on work that builds new skills. Applied new skills or knowledge in daily work.
<input type="radio"/>	5. Role Model	5.00	Proactively identified needs for development and sought out formal and on the job learning or career development opportunities. Volunteered for "stretch" assignments in different or challenging areas to develop new or more proficient skills. Applied new skills or knowledge to practical use in daily work.

Select Proficiency

Self-Evaluation – Summary

Self-Evaluation - Update and Complete

Employee Name

Job Title	TRAINER & INSTRUCTIONAL DESIGN	Manager	Manager Name
Document Type	UTSA Performance Evaluation	Period	09/01/2020 - 08/31/2021
Template	Individual Contributor: FY2021	Document ID	10727
Status	Evaluation in Progress	Due Date	09/14/2021

Enter your ratings and comments for each applicable section and save. When you have finished updating your evaluation select the Complete button to save your changes and send this document to your manager for review.

 [Calculate All Ratings](#)

Goals

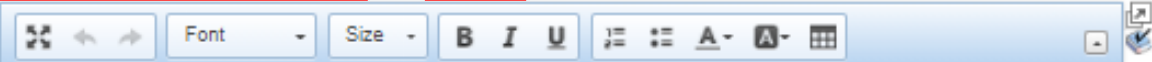
Core Values

Operation Excellence

Personal Growth

Summary

▼ Section 5 - Overall Summary

Employee Rating	0.00
Comments	

Self-Evaluation – Summary

Proficiencies

Rating	Numeric Rating	Description
1. Does Not Meet Expectations	1.00	<p>While this employee may meet expectations some of the time, the employee needs improvement in many of the significantly important requirements of the job or goals established for the year. A corrective action plan may be necessary to address performance and/or behavioral deficiencies.</p> <p>If an employee is rated "Does Not Meet Expectations," please provide a comment.</p>
2. Somewhat Meets Expectations	2.00	<p>Employee often meets the requirements of the job. However, sometimes their performance is in need of improvement.</p> <p>This rating may also be used for employees new in the position who have not yet acquired/demonstrated core competencies or may need some supervision or instruction.</p>
3. Meets Expectations	3.00	<p>An employee rated in this category is a strong solid performer whose performance most often meets the requirements of the job. Occasionally, this employee may exceed expectations of the job.</p> <p>This rating may also be used for employees new in the position who have not yet acquired/demonstrated core competencies or may need some supervision or instruction.</p> <p>If an employee is rated "Meets Expectation," no comment is needed.</p>
4. Exceed Expectations	4.00	<p>Employee is strong solid performer whose performance consistently meets the requirements of the job. Occasionally, this employee may exceed expectations of the job.</p>
5. Role Model	5.00	<p>An employee rated as "Role Model" consistently performs above that which is required. In addition, he/she may often make unique contributions and achieve exceptional accomplishments.</p> <p>If an employee is rated "Role Model," please provide a comment.</p>

Self-Evaluation – Summary

Self-Evaluation - Update and Complete

Employee Name

Job Title	TRAINER & INSTRUCTIONAL DESIGN	Manager	Manager Name
Document Type	UTSA Performance Evaluation	Period	09/01/2020 - 08/31/2021
Template	Individual Contributor: FY2021	Document ID	10727
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Navigation icons: Home, Search, Notifications, Menu, Refresh

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Enter your ratings and comments for each applicable section and save. When you have finished updating your evaluation select the Complete button to save your changes and send this document to your manager for review.

[Calculate All Ratings](#)

- Goals
- Core Values
- Operation Excellence
- Personal Growth
- Summary**

Section 5 - Overall Summary

Employee Rating: 0.00

Comments

Rich text editor toolbar: Undo, Redo, Font, Size, Bold, Italic, Underline, Bulleted List, Numbered List, Link, Unlink, Table

Empty text area for comments

ePerformance in PeopleSoft

In this section of our agenda we covered:

- How to login to ePerformance in PeopleSoft
- How to enter Goals
- How to access the Self-Evaluation portal

What questions do you have?



Goals

- All employees, in conjunction with their manager, develop 3-5 goals at the beginning of the performance year
- Rating is 'Goal Achieved' or 'Goal Not Achieved'
- ***Creating realistic goals at the start is important!***
- Some goals more strategic in nature, some more task oriented
- We'll be using the SMART Goal model
- Let's look at what SMART goals are & how to write them

Setting SMART Goals

- In the Chat box
- How many of you have ever heard the term ‘SMART Goals’?
- What does ‘SMART’ stand for?
 - Specific
 - Measurable
 - Achievable
 - Relevant
 - Time-based



Goals

S	Specific	Clear description of the topic/task of the objective
M	Measurable	Quality, quantity, timeliness, and/or cost effectiveness
A	Achievable	Realistic & within the employee's control (not overly dependent on outside sources)
R	Relevant	Consistent with the employee's role in the workplace
T	Time-Based	There is a timeframe associated with completion

Setting SMART Goals

Why is it important to clearly define goals?

- Communication back and forth between employee and manager
- Employee will know the standard to strive for
- To make sure they are attainable and realistic
- Both employee and manager better able to measure and rate performance
- To make sure employee time and effort is in line with organizational priorities

Specific

Goals should be simplistically written and clearly define what the employee is going to do
Specific is the What, Why and How

Example:

By September 1, 2020 implement a new performance management system for
Classified and A&P staff using clearly defined processes and guidelines so
employees and managers can more competently evaluate performance and
establish career development paths.

Measurable

Measurable so there is tangible evidence that the employee has accomplished the goal
Entire goal statement is a measure; usually several short-term or smaller measurements are built into the goal

Example:

By September 1, 2020 implement a new performance management system for Classified and A&P staff using clearly defined processes and guidelines so employees and managers can more competently evaluate performance and establish career development paths.

Achievable

Stretch the employee slightly to feel challenged; defined well enough so employee can achieve them; employee must possess knowledge, skills, abilities to achieve the goal

In order for an employee to reach this goal:

- They must have a skill set (in area of performance management) that allows them to understand the nature of the goal
- The goal must present a large enough challenge for the employee to remain interested in/committed to accomplishing it.

An employee can meet almost any goal when:

- A solid plan has been set
- Established timeframes allow employee to carry out necessary steps one at a time
- Employee will be able to achieve goals that may have seemed impossible at the beginning
- If a goal is impossible to achieve, the employee may not even try

Relevant

Goals should measure outcomes (not daily activities or tasks)

The goal makes sense within the employee's job function.

It is relevant to the job, will improve the department or division in some way and align with UTSA's strategic initiatives.

The result of a relevant goal is a process that allows employees and managers to better evaluate performance and develop careers. The goal focuses more on strategy, and less on tasks.

Time-based

Goals should be linked to a timeframe that creates a practical sense of urgency
Or results in tension between the current reality and the vision of the goal
Without such tension, the goal is unlikely to produce a relevant outcome

Example:

By September 1, 2020 implement a new performance management system for Classified and A&P staff using clearly defined processes and guidelines so employees and managers can more competently evaluate performance and establish career development paths.

SMART Goal Example

Learn **Articulate Storyline software** in order to develop online learning and **create** from scratch at least one **new online learning module** for **UTSA employees** by the **end of August 2021.**

SMART Goal Example

Organize biweekly meetings with colleagues from other UTSA departments to improve my knowledge of university structure, roles and decision-making within the first quarter of the new performance year.



SMART Goal Example

Make strides in improving our customer service delivery.

Implement an automated customer service ticketing system for our department by August 31, 2021 in order to log service requests by category and to solicit feedback from our customers on a rating scale to measure timeliness and effectiveness of our service delivery.

Your turn to write a goal

- For yourself or one of your subordinates
- Think of the job and your areas of work
- Think of the level of expertise and what would be a stretch but attainable
- Write at least one SMART goal
- Specific, Measurable, Achievable, Relevant, Time-based
- Emphasize the strategic nature of the goal

Individual writing time (3 min.)

Next, you will be in a small break out room with other participants

Zoom break out rooms (8 min.) – if there is extra time, write a second or third goal



Introduction to Performance Management at UTSA

Looking back at what we covered in class today:

- UTSA's new Performance Management process
- Overview of the new process – what, why, who, where, when
- The ePerformance platform in PeopleSoft
- SMART Goals

Resources

- People Excellence created a website dedicated to UTSA Performance Management www.utsa.edu/hr/performance-management
- Resources include Job Aids & Videos
- For Managers
 - How to develop SMART Goals
 - How to rate Core Values & Competencies
- Communications and reminders will be sent throughout the performance year from People Excellence to managers and to all employees
- HR Business Partners are also an important campus resource for all employees
- Visit www.utsa.edu/hr/hrbusinesspartner or Email HR Business Partners: HRBP@utsa.edu

More facilitator-led sessions in October

Go to MyTraining

- <https://mytraining.utsa.edu/classroom>
- Click Schedule to search for classes in date order

Training is called:

[Introduction to Performance Management at UTSA](#)

(course code SD 640)

Several dates and times throughout October

Closing Activity – Write 3 Commitments

- + 1 commitment about your SMART goals
- + 1 commitment about ePerformance
- + 1 thing you learned that you will share with a colleague

= **Your 3 Commitments for Action**



Introduction to Performance Management at UTSA

Thank you!

For additional information contact:

UTSA People Excellence Talent Management Team

Email: Training@utsa.edu

210-458-4250

