

2020-2021 Performance Review Cycle Timeline

Penn State Human Resources <HumanResources@psu.edu>

Wed 9/30/2020 8:20 AM

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Dear Colleagues,

Human Resources (HR) Talent Management is ready to launch the 2020-2021 Performance Review Cycle. The new Performance Review Cycle will run Thursday, October 1, 2020 through Wednesday, June 30, 2021.

I recognize that the time elapsed from the prior cycle end-of-year (April 30) is a significant gap and left many people wondering what, if any, action they should be taking to set goals. I want to thank you for your patience while we worked to determine the best approach for the performance review cycle process.

If you are a member of a team or unit that chose to move forward and establish goals during this gap, there is no need for you to go through the goal setting process again. Workday will open for the new year on Monday, November 2. You should enter your goals at that time and continue your performance year.

If you are a member of a team or unit that has yet to set goals for the new cycle, the month of October will be dedicated to goal setting. On Thursday, October 1, we will send another message containing guidance, information, and resources to support goal setting. This message will provide guidance for including performance activity that occurred May 1 through September 30 in the new cycle.

If you are a manager of an individual that participates in the performance review process, but you do not personally participate (ie: Executive, Academic Administrator), you are receiving this mail so you are aware the performance cycle is being launched.

Finally, we have planned several updates to the performance review process this year. Most notably, we are removing the Mid-Year Check-In activity. Check out the [Penn State Today announcement](#) for more information and look for additional information to support goal setting on Thursday, October 1.

Thanks,
Christy Helms
Penn State Human Resources
Sr. Director, Talent Management
814-865-2753
cwh19@psu.edu

2020-2021 Performance Review Cycle: Setting Goals

Penn State Human Resources <HumanResources@psu.edu>

Mon 10/5/2020 9:33 AM

**PennState**
Human Resources**Performance
Review**

Dear Colleagues,

This email is a follow up to the communication sent earlier this week announcing the Performance Review Cycle for 2020-2021. It contains information related to the "Set Goals" activity taking place during the month of October.

As a community, we are dealing with constant change. Many of us are focused on short term goals – what needs to be accomplished in the next month or semester – rather than long range goals. The Performance Review Cycle should support your work. It is an opportunity to set expectations and ensure individuals, teams, and units are working together to achieve objectives- both short term and long term.

Please plan that during the month of October you will develop and finalize your goals in partnership with your manager. Visit the [performance management webpages](#) on the [HR website](#) to access training and job aids to support this activity and refer to the [Penn State Today article](#) dated September 28 for information regarding planned changes to the process for this year.

A tremendous amount of work and effort has been put forward between the close of the last review cycle (May 1) and the launch of the new cycle (October 1). It is important to acknowledge and reflect on your accomplishments during this 6-month period. We recommend that employees create a goal titled **"Accomplishments and Reflections: May 1 – September 30."** In the "description" portion of the review template, document your accomplishments from this time. Refer to the [Goal Setting timeline](#) that can be found on the HR website. During goal setting discussions between the employee and manager take time to review these accomplishments. Once the employee has entered goals into Workday (beginning Monday, November 2), the manager and employee can both enter a comment on the goal, summarizing feedback provided during the discussion. Taking time to document and discuss these accomplishments now ensures they are not lost during the Final Goal Review activity in June 2021. These accomplishments can be considered when determining your final ratings.

If you still have questions related to this process after reviewing the resources available on the [HR Performance Management webpages](#), please attend one of our upcoming [Office Hours events](#), or reach out to me directly.

Kind regards,
Christy Helms
Penn State Human Resources
Sr. Director, Talent Management
814-865-2753
cwh19@psu.edu

Workday is now OPEN for Performance Review goal entry.

Penn State Human Resources <HumanResources@psu.edu>

Tue 11/3/2020 10:34 AM



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Dear Colleagues,

Workday is now open for goal entry! Please check your [Workday](#) inbox for a notification titled "Set Content: 2020-2021 Step 1: Setting Goals and Expectations". Following the instructions provided in this notification, you can complete the [Set Goals](#) phase of the performance review cycle by entering the goals you developed during the month of October. We encourage you to complete your goal entry by **Friday, November 13**. While the system will not close on November 13, the sooner you enter your goals, the sooner you can take action to complete them. Additionally, once entered in Workday, goals cannot be updated or edited until they are approved by your manager.

Two resources are available to support goal entry:

- A Knowledge Base article titled [Adding or Updating Goals in Workday](#).
- An instructional video located in the Learning Resource Network (LRN) titled [Setting Goals and Expectations in Workday](#).

If after reviewing these resources you still have questions regarding goal entry, please submit an inquiry via [WorkLion](#) and select "Talent Management/Workplace Learn

Kind regards,
Christy Helms
Penn State Human Resources
Sr. Director, Talent Management
814-865-2753
cwh19@psu.edu

2020 - 2021 Performance Review Cycle - Managing Goals

Penn State Human Resources <HumanResources@psu.edu>

Mon 11/30/2020 3:19 PM

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Dear Colleagues,

Thanks to everyone who has set their goals for the 2020 – 2021 performance review cycle. We appreciate your timely response to this step. With goals officially entered into Workday, your focus now should be on [managing goals](#).

It is important that effective and regular conversations take place throughout the performance review cycle between the employee and manager. Please keep the following in mind when managing your goals throughout the year:

- **Meet regularly**...come prepared with notes and status updates on your goal progress.
- **Be balanced**...discuss what is working and what is not working.
- **Be constructive**...focus on the challenges and potential solutions.
- **Be open**...process the feedback, consider the opportunity, and apply it.
- **Document conversation outcomes**...use the 'comments' in Workday or maintain notes externally.

Take a moment to watch this 30-minute video, "[Gaining a Positive Perspective on Feedback](#)," to help improve the way you digest and process feedback. Additionally, you can access knowledge base articles for how to [update or add goals](#) and [enter comments](#) in Workday.

If you have not yet completed the Set Goals step as an employee or manager, please make time to complete this activity in the performance review process.

If you have any questions regarding the performance review process, please submit an inquiry via [WorkLion](#) – select "Talent Management/Workplace Learning" as the topic.

Kind regards,
Christy Helms
Sr. Director, Talent Management
814-865-2753
cwh19@psu.edu