Performance Management @ Tech
Knowledgebase Article

Brief Description
This article provides an overview of the performance management process and how to use the Performance Management @Tech system.

Audience
- This article applies to all employees classified as Staff and People Leaders who supervise staff employees.
  - Note: GTAA, E12, GTRI, affiliates, and students are excluded from the Performance Management process.
- Academic Faculty, Research Faculty, Academic Professionals, or Post Doc Fellows are not required to use the forms or processes outlined in this article
- Note: Linked resources are available on an as-need basis (e.g., employees will not have access to the Manager resources included in this article)

Process Overview
Performance management is the process of managing, coaching, developing, and evaluating employees to cultivate relationships and create plans for future success. There are four components of the performance management cycle:

- Goal Setting
- Continuous Coaching and Feedback
- Self-Assessment
- Formal Review

At the beginning of the cycle, employees and managers meet to set goals for the coming year. Throughout the year, dialogue should occur between managers and employees to determine progress towards those goals. At the end of the year, employees are asked to complete a self-assessment as to how they performed in the accomplishment of those established goals.

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Employees are also asked to highlight key accomplishments. After the self-assessment period has closed, managers are tasked with completing the annual performance evaluation. Once completed, managers and employees meet to have a formal review of achievements and areas of opportunity based on the goals set at the beginning of the year.

All annual reviews should be completed at least once a year by the stated deadline of March 31 of the following year.

**Goal Setting Plan Phase**

The goal-setting phase of the performance period is the foundation of the entire process and sets the objectives for the year ahead. During this time, performance criteria and goals should be set and entered into the system. It is encouraged that both the manager and employee collaborate to determine agreed-upon performance goals that are aligned with achieving the department or unit objectives. Career and leadership goals should also be discussed. Ultimately, managers are responsible for approving the goals that are entered by their employee(s).

**Expectations and Best Practices for 2024 Goal Setting**

- Create a minimum of 2 values-based goals for the year
- Create a minimum of 1 career goal for the year
- Create 1 – 2 leader competency goals
- Utilize the SMART goal process (Specific, Measurable, Achievable, Relevant, and Time-Based) to create goals that increase motivation and commitment to goal attainment
- Reference Georgia Tech’s L.O.V.E. GT Values

**Core Competencies and Leadership Competencies**

All employees will be rated on Georgia Tech’s core competencies.

- Decision Making
- Effective Communication
- Honesty & Integrity
- Interpersonal Relationships
- Job Knowledge
- Results
- Service Excellence

All staff managers and supervisors will also be rated on leadership competencies.

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• Act Strategically
• Demonstrate Inclusivity
• Exhibits Social Intelligence
• Develops Self & Others

Use the following resources to help set goals and define criteria:

• Define Criteria for Employee in the system as a Manager
• Define Criteria in the system as an Employee

Continuous Coaching and Feedback
Once goals have been set for the year, managers and employees should have a check-in to discuss the defined goals, responsibilities, and competencies. At this point, the manager can update defined criteria as needed. The manager is responsible for approving the finalized goals in the system.

Use the following resources to navigate to checkpoint 1:

• Navigating to Checkpoint 1 in the system as a Manager
• Navigating to Checkpoint 1 And Finalize Criteria In the system As An Employee

Formal Review
At the conclusion of the performance management cycle, both parties have a discussion to review performance for the year. If SMART goals have been set and ongoing communication and feedback has taken place, both parties should have a productive performance review discussion.

Managers and their employees are encouraged to nominate participants or individuals who will provide additional performance feedback on their employees. Participants have the right to either accept or reject the nomination to review an employee. The status of nominee acceptances can be tracked within the system.

Use the following resources to nominate participants:

• Nominate Participants in the system as a Manager
• Complete Employee Evaluation as a Participant
• Review Participants Evaluation as a Manager

Employees will need to complete their Self-Evaluation and Annual Self-Assessment and submit through the system to their manager.

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Use the following resources to complete and review evaluations:

- **Complete Self-Evaluation as an Employee**

Once the participant and employee have submitted their evaluations, the manager should review both in the system. It is the manager’s job to rate the employee’s performance on a scale from 1 to 5 and add comments to the Performance Evaluation. Once this review is complete, the manager should reach out and schedule dedicated time to review the evaluation with the employee, allowing ample time for the appraisal to be completed and questions to be answered.

**Best Practices for Completing Reviews**

- Schedule a dedicated time for the performance review conversation, allowing ample time for the appraisal to be completed
- Choose a location that is free from interruptions and distractions
- Review notes and other documentation you have compiled throughout the year concerning the employee’s performance
- Have the employee complete a self-evaluation and review it prior to preparing the final review
- Provide the employee with a draft copy of the completed performance review prior to the actual review conversation
- Ensure constructive two-way communication during the review conversation (listening attentively and encouraging dialogue)
- Schedule a performance planning meeting within 30 days after the review conversation to collectively establish goals for the upcoming performance review cycle

The final step of the performance management process is for the employee to acknowledge the review in the system. Signing acknowledges that the employee manager met and discussed the performance for the year. There is a place for employee comments on the review as well to add any additional thoughts.

Use the following resources to complete the final steps of the performance management process:

- **Review Employee Self-Evaluation as a Manager**
- **Share Eval with Employee and Submit for Approval as a Manager**
- **Acknowledge Evaluation as an Employee**

**Frequently Asked Questions (FAQs) (ONLY IF NEEDED; limit to 1-2 questions)**

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Q. If a faculty member is going through periodic peer review, do they need an annual review?
A. Yes, the faculty periodic peer review process is different than the annual performance review process.

Q. Do probationary employees receive a performance review?
A. Probationary employees are reviewed after successful completion of their probationary period using the designated probationary review form in the system. For guidance on evaluating probationary employees, please refer to OHR Policy 4.6, Performance Review Following Probationary Period.

Additional Resources
- Performance Management website
- Leadership Competencies