Beyond Ratings: Strategies For Your Performance Self-Review

E & A CONSULTING GROUP, INC.

Leave it at the door

Positive Attitude

Growth Mindset

Agenda

1. The Why & Benefits
2. The Process Flow
3. Competencies & Rating Scale
4. Demo
5. Feedback
6. Goal Setting
7. Expectations

Core Value: **Our People**

"Employee Development- we provide **leadership**, a career path, professional development and **meaningful performance reviews to every employee.**

2022/2023 Strategic Goal:

Adapting improved performance management systems and training to deliver a more meaningful review

2023 Strategic Goal:

Developing a development plan tool that can be implemented across the company

Benefits to Automating Performance Reviews

Accountability

Consistency

Data-Driven Insights

Continuous Feedback

Improved Transparency

Performance Documentation

Enhanced Employee Engagement

Compliance and Legal Protection

The Process Flow

Performance Review Process

1 - SUPERVISOR

Dec. 1 - Review opens
Complete 1st Pass by
1/12/24

1 - EMPLOYEE

Self review kicks off
Employees will be
notified Dec 7, 2023.
Have 35 days to
complete their self
review

2 - INDIRECT MANAGER

The indirect manager
will have 10 days to:

Option 1:
Review and Rate

Option 2:
Review Only

Option 3:
Do nothing

3 - HR REVIEW

HR (Nicolette or Tom)

HR will review.

HR will meet with
managers in this stage if
there are needed edits.

Verify who will be in the
review session at this
stage.

*HR Reviewer can revert
steps back if needed.

4 - SUPERVISOR

Makes final edits before
delivery.

Taking into account the
Indirect Manager
feedback/ratings if any
and also the Employee
Self- Review /Goals

Prints Copies for the
Review Session

5 - DELIVERY

Meets with the
employee to go over the
performance review
with all agreed upon
parties before
February 28, 2024

*Note that there has to
be an independent 3rd
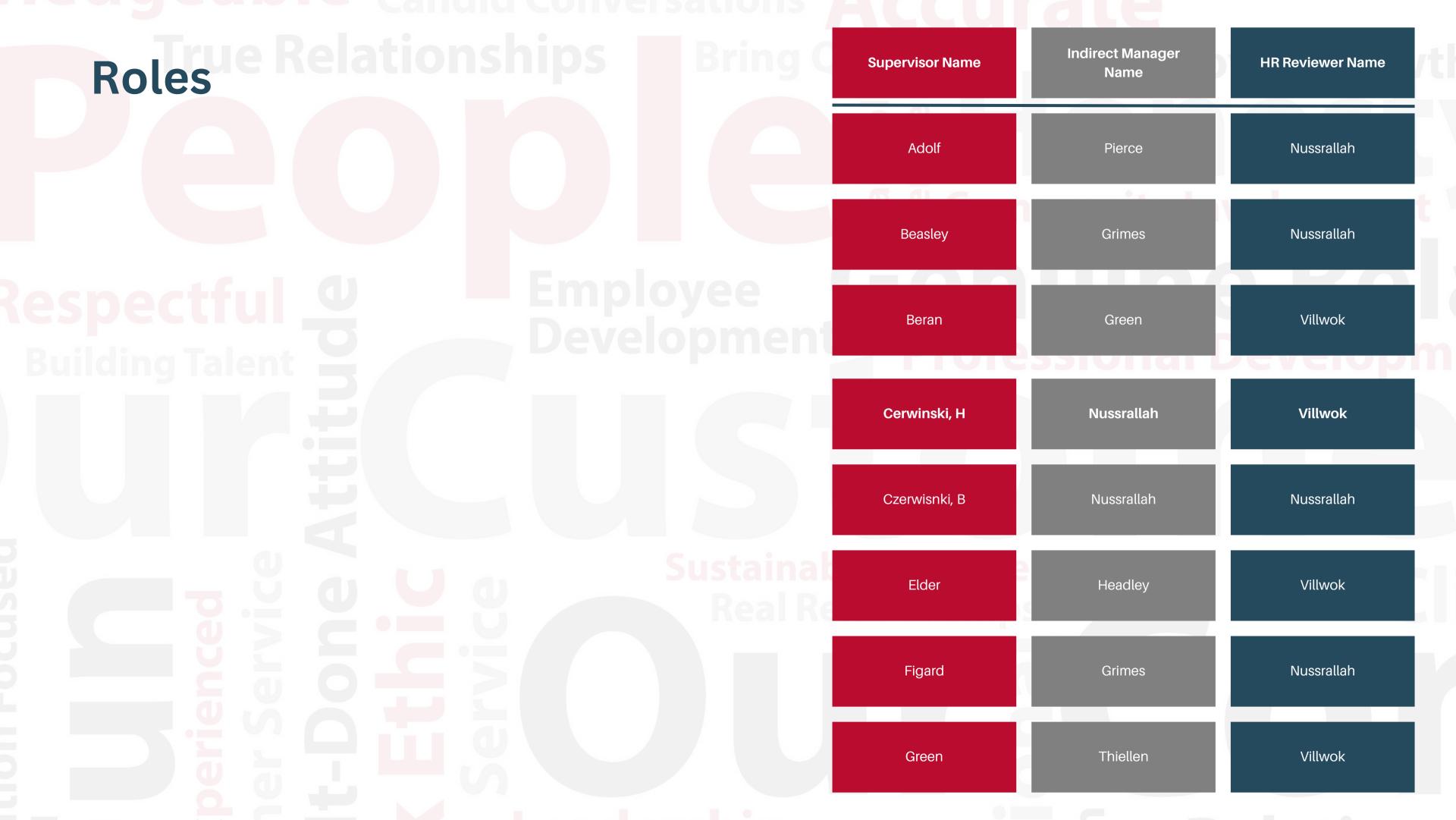Party (Nicolette/Tom)
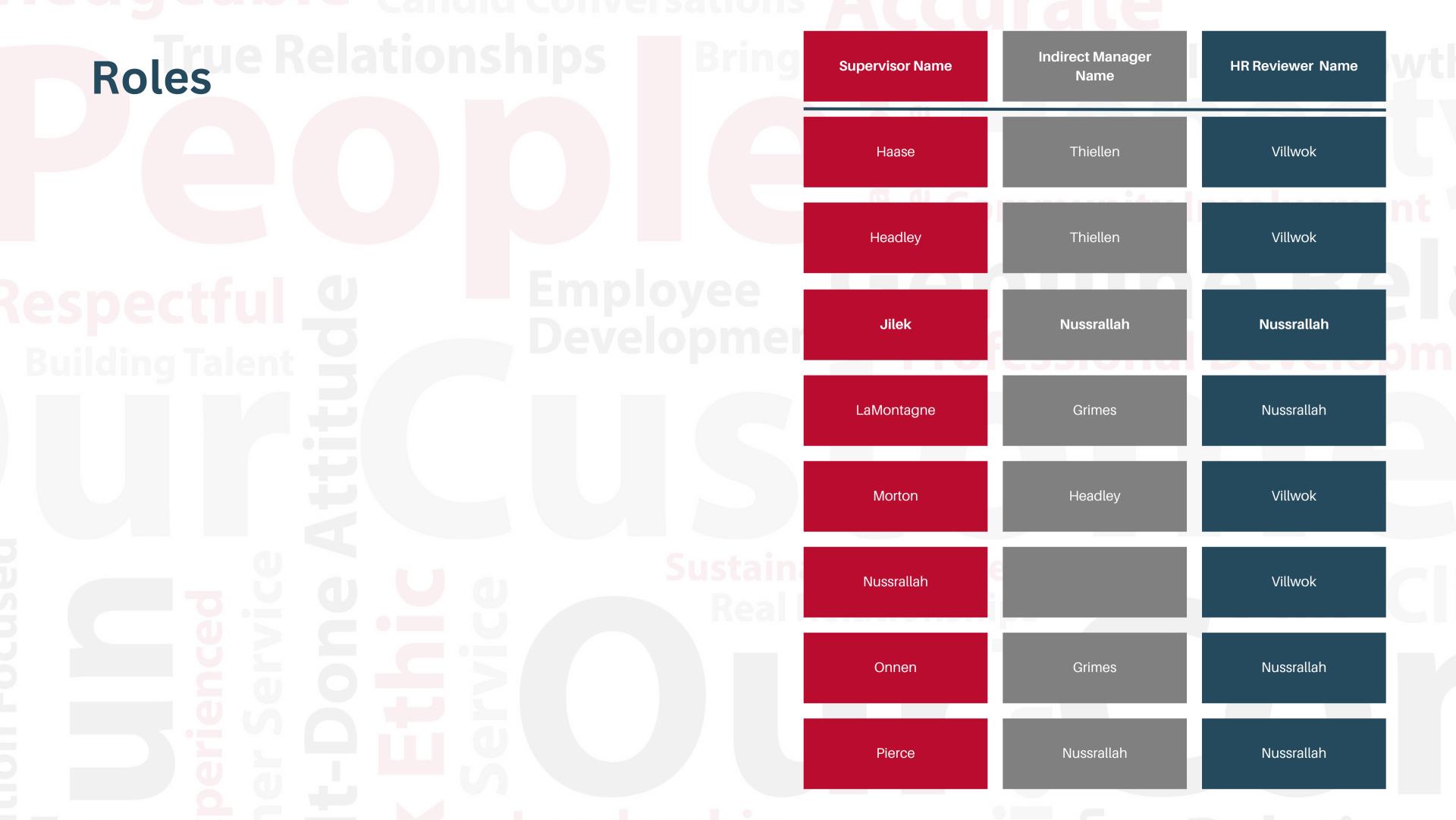
5 - SIGNATURES

Manager electronically
signs

Manager can make any
final post conversation
tweaks before signing

6 - SIGNATURES

Employee re-reviews all
the documents then
electronically signs

***2023 process does not include interns
OR New Hires after 9/1/2023**

Roles

Supervisor Name	Indirect Manager Name	HR Reviewer Name
Adolf	Pierce	Nussrallah
Beasley	Grimes	Nussrallah
Beran	Green	Villwok
Cerwinski, H	**Nussrallah**	**Villwok**
Czerwisnki, B	Nussrallah	Nussrallah
Elder	Headley	Villwok
Figard	Grimes	Nussrallah
Green	Thiellen	Villwok

Roles

Supervisor Name	Indirect Manager Name	HR Reviewer Name
Haase	Thiellen	Villwok
Headley	Thiellen	Villwok
Jilek	**Nussrallah**	**Nussrallah**
LaMontagne	Grimes	Nussrallah
Morton	Headley	Villwok
Nussrallah		Villwok
Onnen	Grimes	Nussrallah
Pierce	Nussrallah	Nussrallah

Roles

Supervisor Name	Indirect Manager Name	HR Reviewer Name
Purcell	Nussrallah	Nussrallah
Rush	Thiellen	Villwok
Schaben	Headley	Villwok
Sechser	**Jilek**	**Nussrallah**
Stoll	Thiellen	Villwok
Thiellen		Villwok
Thomas	Headley	Villwok
Villwok	Nussrallah	Nussrallah

Roles

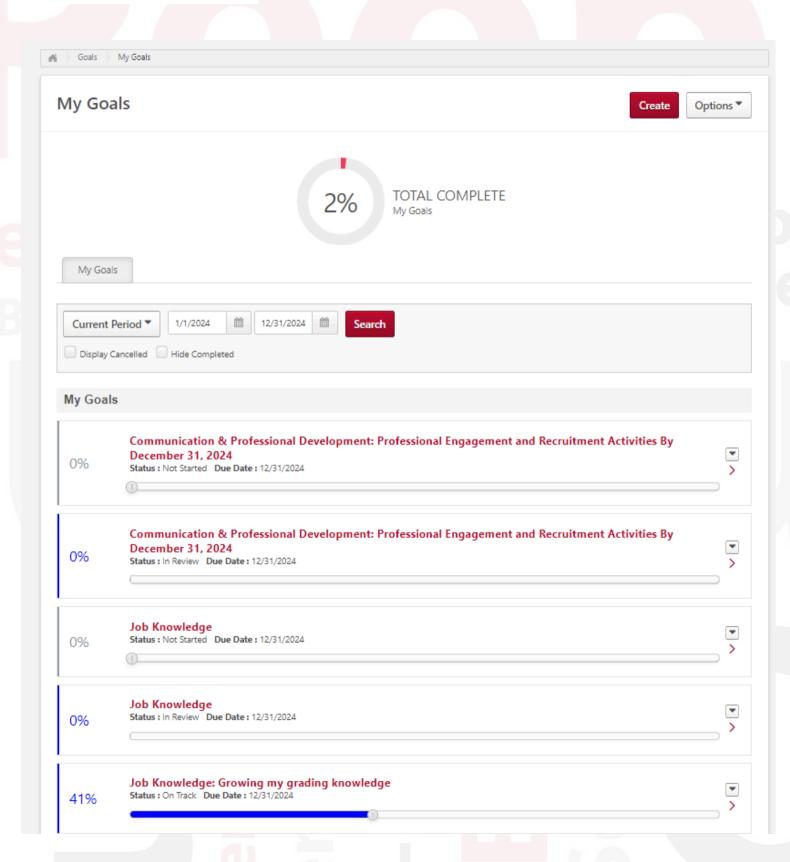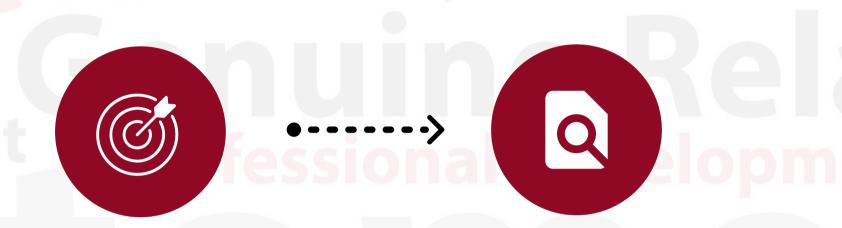| Supervisor Name	Indirect Manager Name	HR Reviewer Name
Vohl	Grimes	Nussrallah
Wojtkiewicz	Czerwinski, B	Nussrallah
Wooten	Czerwinski, B	Nussrallah
Zelensky	**Pierce**	**Nussrallah**

After Performance Reviews are signed electronically, updating your goal activity in Cornerstone will be important!
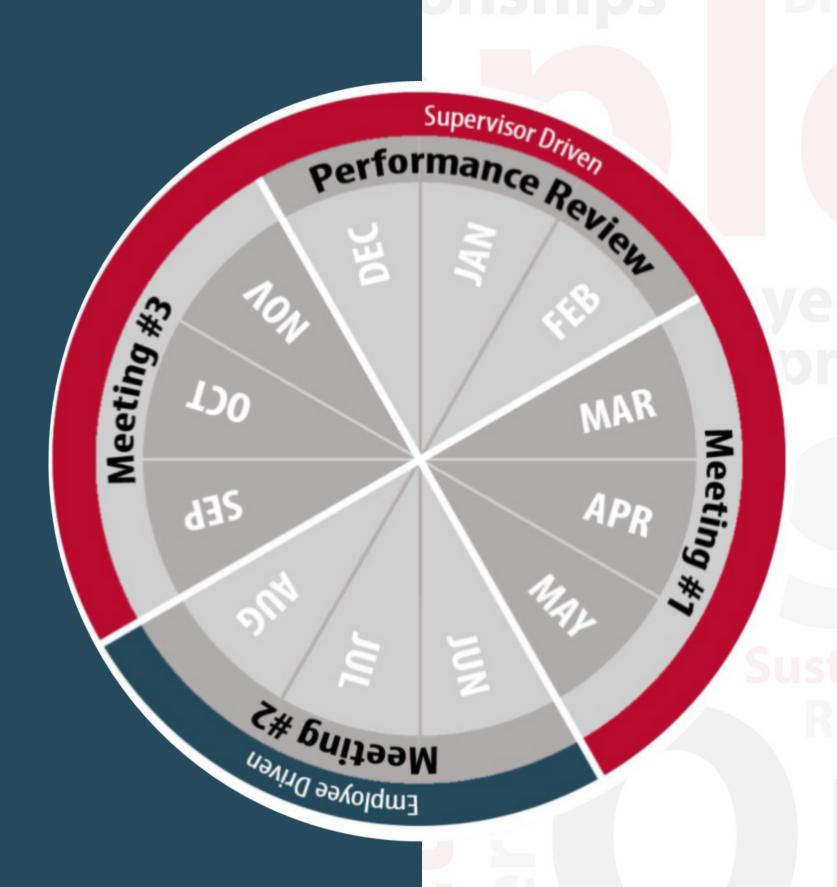

1 - EMPLOYEE

Reports out on the goals progress in Cornerstone

2 - SUPERVISOR

Checks in on goals progress in 1:1's

2024 1:1's

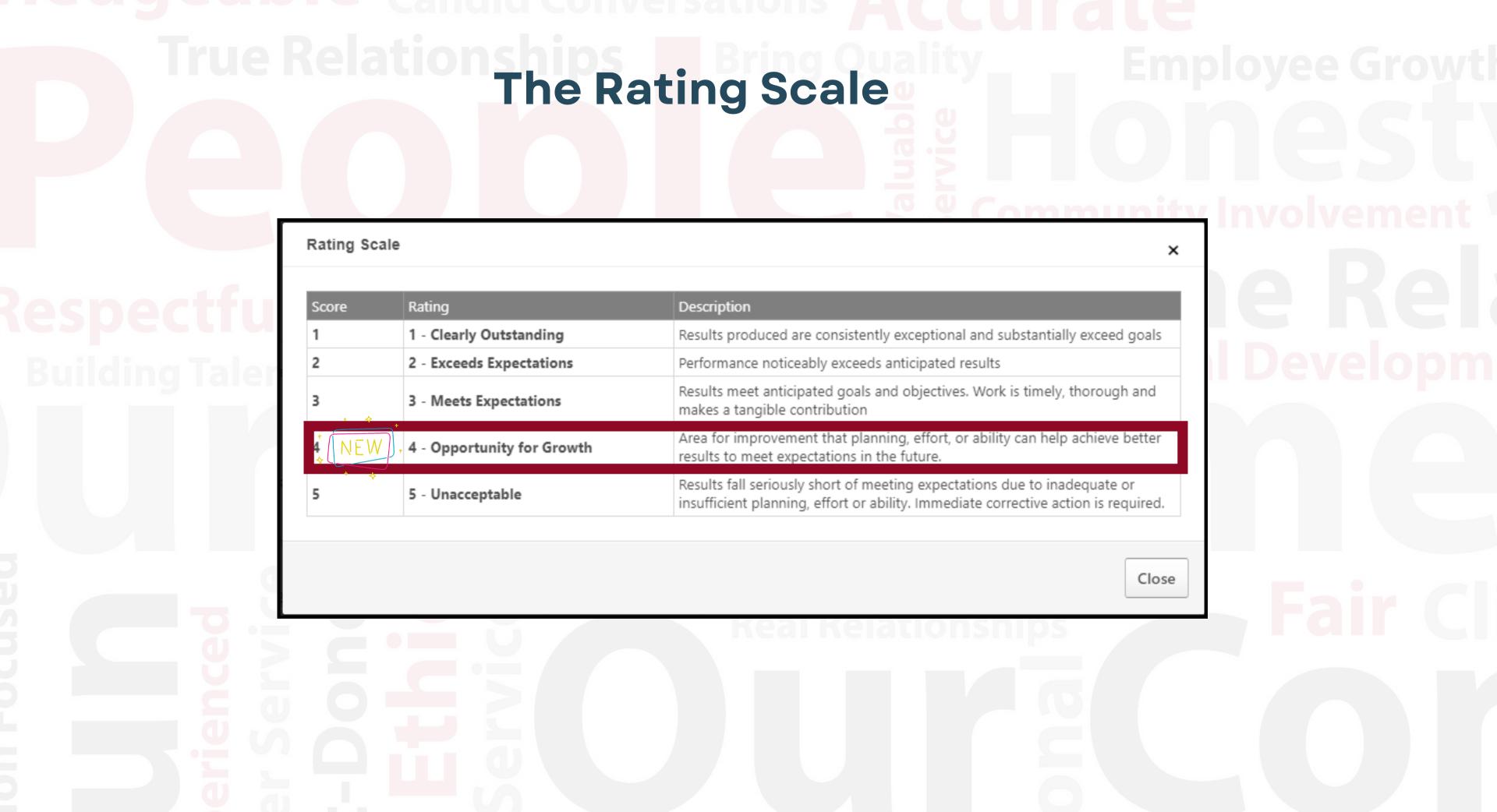**Supervisor Scheduled Meeting**
March to May
One minimum

Employee Scheduled Meeting
June to August
One minimum

Supervisor Scheduled Meeting
September to November
One minimum

Competencies & Rating Scale

The Rating Scale

Rating Scale

Score	Rating	Description
1	**1 - Clearly Outstanding**	Results produced are consistently exceptional and substantially exceed goals
2	**2 - Exceeds Expectations**	Performance noticeably exceeds anticipated results
3	**3 - Meets Expectations**	Results meet anticipated goals and objectives. Work is timely, thorough and makes a tangible contribution
4	4 - Opportunity for Growth	Area for improvement that planning, effort, or ability can help achieve better results to meet expectations in the future.
5	**5 - Unacceptable**	Results fall seriously short of meeting expectations due to inadequate or insufficient planning, effort or ability. Immediate corrective action is required.

NEW

Close

Rating Scale   ✕

Score	Rating	Description
1	**1 - Clearly Outstanding**	Results produced are consistently exceptional and substantially exceed goals
2	**2 - Exceeds Expectations**	Performance noticeably exceeds anticipated results
3	**3 - Meets Expectations**	Results meet anticipated goals and objectives. Work is timely, thorough and makes a tangible contribution
4	**4 - Opportunity for Growth**	Area for improvement that planning, effort, or ability can help achieve better results to meet expectations in the future.
5	**5 - Unacceptable**	Results fall seriously short of meeting expectations due to inadequate or insufficient planning, effort or ability. Immediate corrective action is required.

Close

- "A" on a school grading scale
- This means that the individual is doing what is expected
- Meeting Deadlines- very occasional/rare errors
- Working acceptable hours
- Helping when needed/asked

Rating Scale

Score	Rating	Description
1	1 - **Clearly Outstanding**	Results produced are consistently exceptional and substantially exceed goals
2	2 - **Exceeds Expectations**	Performance noticeably exceeds anticipated results
3	3 - **Meets Expectations**	Results meet anticipated goals and objectives. Work is timely, thorough and makes a tangible contribution
4	4 - **Opportunity for Growth**	Area for improvement that planning, effort, or ability can help achieve better results to meet expectations in the future.
5	5 - **Unacceptable**	Results fall seriously short of meeting expectations due to inadequate or insufficient planning, effort or ability. Immediate corrective action is required.

Close

- "A+" on a school grading scale
- This means that the individual is doing what is expected & from time to time is doing a little extra credit
- Ex: Staying late, extra hours, extra projects, helping others without being requested and it not impacting their workload

Rating Scale

Score	Rating	Description
1	1 - Clearly Outstanding	Results produced are consistently exceptional and substantially exceed goals
2	2 - Exceeds Expectations	Performance noticeably exceeds anticipated results
3	3 - Meets Expectations	Results meet anticipated goals and objectives. Work is timely, thorough and makes a tangible contribution
4	4 - Opportunity for Growth	Area for improvement that planning, effort, or ability can help achieve better results to meet expectations in the future.
5	5 - Unacceptable	Results fall seriously short of meeting expectations due to inadequate or insufficient planning, effort or ability. Immediate corrective action is required.

Close

- "A++" on a school grading scale
- This means that the individual is doing what is expected & their extra credit is consistently done
- Ex: Staying late, extra hours, extra projects, helping others without being requested and it not impacting their workload
- Multiple "1" ratings mean we should consider next step in career

Rating Scale

Score	Rating	Description
1	**1 - Clearly Outstanding**	Results produced are consistently exceptional and substantially exceed goals
2	**2 - Exceeds Expectations**	Performance noticeably exceeds anticipated results
3	**3 - Meets Expectations**	Results meet anticipated goals and objectives. Work is timely, thorough and makes a tangible contribution
4	**4 - Opportunity for Growth**	Area for improvement that planning, effort, or ability can help achieve better results to meet expectations in the future.
5	**5 - Unacceptable**	Results fall seriously short of meeting expectations due to inadequate or insufficient planning, effort or ability. Immediate corrective action is required.

Close

- "B-C" on a school grading scale
- This means that the individual is doing less than expected.
- More than the one or two errors on occasion. There is consistently an error or missed step.
- For example: You see them working many more hours and their projects are taking longer on occasion and/or not working full hours needed.

Rating Scale

Score	Rating	Description
1	**1 - Clearly Outstanding**	Results produced are consistently exceptional and substantially exceed goals
2	**2 - Exceeds Expectations**	Performance noticeably exceeds anticipated results
3	**3 - Meets Expectations**	Results meet anticipated goals and objectives. Work is timely, thorough and makes a tangible contribution
4	**4 - Opportunity for Growth**	Area for improvement that planning, effort, or ability can help achieve better results to meet expectations in the future.
5	**5 - Unacceptable**	Results fall seriously short of meeting expectations due to inadequate or insufficient planning, effort or ability. Immediate corrective action is required.

Close

At E&A, our performance review has Ten factors used to evaluate performance: Quality, Productivity, Job Knowledge, Self-

- "D-F" on a school grading scale
- This means that the individual is doing what is far less than expected.
- There are significant errors on very consistent basis. There are consistently missed steps and shortcuts.
- Their projects are taking longer and/or they are not putting in the hours week after week.
- Without correction, this is a path for termination.
- Immediate corrective action is needed (6-8 weeks)

Competencies & Review Structure

- Communication
- Customer Service
- Dependability/Initiative /Attitude
- Flexibility/Adaptability
- Job Knowledge
- Judgment/Decision Making/ Problem Solving
- Productivity
- Quality of Work
- Self-management
- Teamwork

Summary
2024 Goals

E & A CONSULTING GROUP, INC.

Annual Performance Review (2023)
Review Period 1/1/2023 - 12/31/2023

REVIEWER
Douglas Walter (Manager), Anna Grimes (Indirect Manager), Nicolette Villwok (User)
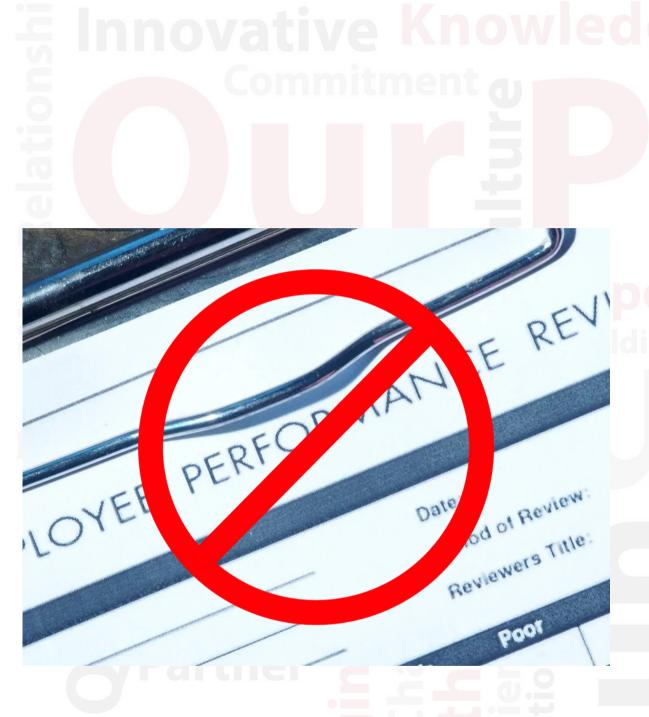
Brock Walla

Individual Contributors
Position

6/1/2020
Hire Date

Demo

Feedback:
Filling out the review

A self-review is not just a routine task; it is a valuable opportunity for self-reflection, goal setting, and effective communication.

It empowers you to actively participate in your own professional development and contributes to a more comprehensive understanding of your role within the organization.

Each competency area should be:

- **Clear & Conciseness:** Keep your writing clear and concise. Avoid unnecessary jargon or overly complex language. Clearly articulate your points to ensure easy understanding.
- **Use Action Verbs:** Start your sentences with strong action verbs to convey a sense of accomplishment and engagement. This adds dynamism to your self-review.
- **Quantify Achievements:** Whenever possible, use specific numbers, percentages, or other measurable metrics to quantify your achievements. This provides concrete evidence of your impact.
- **Show, Don't Just Tell:** Instead of just stating your accomplishments, provide specific examples or anecdotes that illustrate your contributions. This makes your self-review more compelling and memorable.
- **Tailor to the Audience:** Consider who will be reading your self-review and tailor your language and examples accordingly. Make sure your achievements align with the priorities and values of your organization.
- **Balance Positivity and Realism:** While it's essential to highlight your accomplishments, be realistic about your contributions. Acknowledge areas where you can improve, demonstrating self-awareness and a commitment to growth.
- **Reflect on Growth:** Include reflections on your personal and professional growth over the evaluation period. Discuss how you've overcome challenges and developed new skills.
- **Express Enthusiasm:** Convey enthusiasm for your role and the organization. Use positive language to express your commitment and passion for your work.

Self-Review Tips

- Start Early
- Acknowledge Challenges, Feedback & Areas for improvement
- Acknowledge your skill development
- Professional and Positive
- Edit for Consistency
- Proofread for errors

Looking Over The Year

- Review all of your notes
- Review past meetings, like 1:1 meetings
- Review past projects
- Think through all of the activities you are involved in involved professionally and activities for E&A

*Pre-Review Survey

Use Action Verbs:

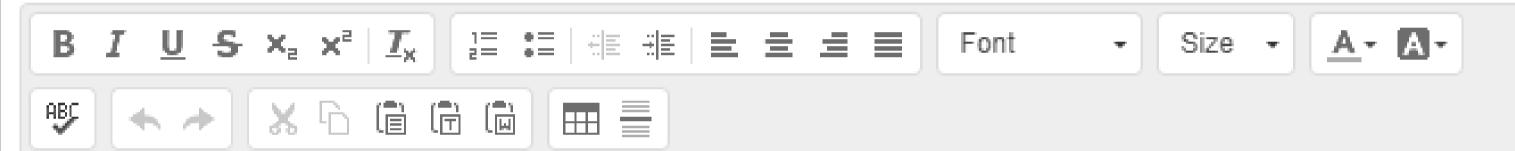| Achievements	Initiative & Leadership	Problem Solving	Communication	Teamwork	Adaptability	Learning & Development	Impact & Results
Achieved	Initiated	Resolved	Communicated	Collaborated	Adapted	Learned	Impacted
Accomplished	Led	Addressed	Presented	Cooperated	Flexed	Acquired	Influenced
Attained	Directed	Overcame	Conveyed	Contributed	Adjusted	Developed	Generated
Completed	Guided	Troubleshooted	Articulated	Supported	Embraced change	Mastered	Produced
Exceeded	Spearheaded	Solved	Negotiated	Assisted	Adjusted	Enhanced	Yielded
Surpassed	Facilitated	Innovated	Collaborated	Partnered	Adapted	Expanded	Contributed to
Outperformed	Coordinated	Improved	Facilitated	Engaged	Innovated	Upskilled	Drove
Realized	Orchestrated	Streamlined	Influenced	Fostered	Optimized	Trained	Delivered
Secured	Managed	Optimized	Informed	Unified	Rectified	Studied	Catalyzed
Accomplished	Organized	Rectified	Corresponded	Coordinated	Mitigated	Assimilated	Effectuated
Reached	Executed	Mitigated	Clarified	Participated	Remedied	Incorporated	Implemented
Delivered	Oversaw	Remedied	Synthesized	Built	Navigated	Applied	Fulfilled

Productivity

Completes work assignments & responsibilities in an efficient & timely manner. Effectively uses resources.

3 - Meets Expecta... ▼ ❓ *

Comments :

Over the past year, I consistently met expectations in productivity, **ensuring** timely task execution and **fostering** a positive working environment through collaborative efforts. Notable successes include Project A to **exceed** supervisor expectations, as noted in my 1:1 meeting 4/31/2023. **Optimizing** processes in Project B, and **contributing** to the seamless workflow of Project C, all of which **aided** team success as noted in my 1:1 Meeting on 10/31/2023.

However, **challenges emerged** in projects like Project X, where tight deadlines affected deliverable quality, and Project Y, revealing communication breakdowns. Project Z highlighted the need for improved resource allocation. These experiences underscore the importance of **refining** time management under pressure, **enhancing** communication strategies, and **implementing** thorough resource planning. **Moving forward**, I'm **dedicated to** building on successes and addressing challenges for continuous improvement in my role.

Communication
Customer Service
Dependability/Initiative /Attitude
Flexibility/Adaptability
Job Knowledge
Judgment/Decision Making/ Problem Solving
Productivity
Quality of Work
Self-management
Teamwork

Goal Setting

6

Setting clear goals offers advantages

Annual Performance Review (2023)

Options ▼

Individual Contributors
1/1/2023 - 12/31/2023

50%

GOAL SETTING

Employee:

Now that you have completed the goal setting survey, you may consider drafting goals 3 to 5 goals for next 12-months. Your supervisor will review these goals and may also consider editing and/or adding additional goals.

Supervisor:

After examining the goal-setting pre-work, carefully review any goals proposed by the employee. It is recommended that each employee have 3-5 goals encompassing a blend of professional and technical objectives. These goals can be ones set by the employee or collaboratively established with you.

Notes about Goal Setting (Employee and Supervisor):

- Align goals with at least one of our ten competencies. Unless, it is a professional development goal. This could be working on a PE or attending an offsite training class or joining a networking group for example.
- Reminder of the competencies. These are Quality, Productivity, Judgement, Customer Service, Self - Management, Dependability, Flexibility, Communication, Teamwork, and Job Knowledge.
- Use the S.M.A.R.T. approach.

Specific - What will you specifically set to accomplish.

Measurable - Make sure that their milestones?

Achievable - Ensure that the goal is realistic

Relevant - that the goal is relevant to your role or future development

Time-based - Set a time that the goal must be accomplished by.

After the review is completed, employees will be asked to update the goals for the coming year in cornerstone to show their progress.

- Aligning efforts with organizational objectives
- Increasing motivation
- Measuring progress
- Promoting accountability
- It also supports professional development
- Fosters teamwork
- Encourages innovation

Overall, setting goals creates a structured framework for performance and growth, benefiting both yourself and the organization.

Goal Setting: Pre-Work

2024 GOAL SETTING PRE-WORK - EMPLOYEE

Please take a few moments to reflect on both your technical and professional development.

After reflecting, the next step will to consider your next years goals.

If you do not have any suggestions for your goals, please connect with your supervisor.

What is your long-term goal or career objective?
What are your short-term goals or job roles that might help you get to your long-term goal?
Are there any specific job duties or responsibilities that you would like to do?
Is there any specific training that you want?

Goal Setting:

For the Title, choose 1 of the following:

- One of the Ten Competency's
- Professional Development
- Management or Leadership
- Business Development

Or a combination of the above.

Title *

Title

Description *

B *I* U S | *I*ₓ   ☰ ☰ | ☰ ☰   ABC✓

Start Date   Due Date *

1/1/2024   12/31/2024

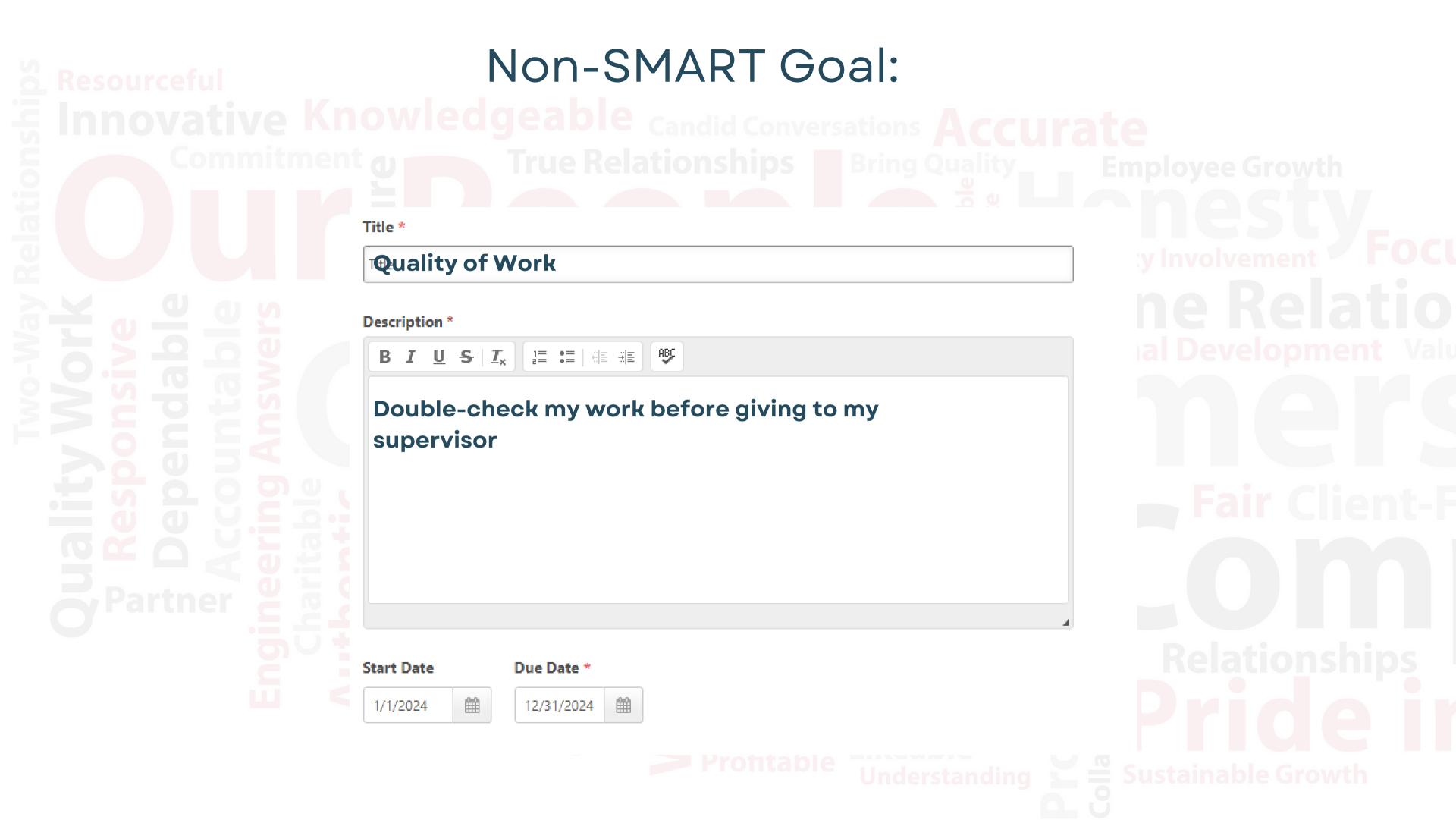The SMART framework helps ensure that goals are well-defined, actionable, and aligned with the overall objectives of the individual or organization, making them more likely to be achieved.

Non-SMART Goal:

Title *

Quality of Work

Description *

| **B** *I* U S̶ | 𝐼ₓ | | 1⃣ ⦂ | ⇤ ⇥ | | ᴬᴮᶜ |

Double-check my work before giving to my
supervisor

Start Date

1/1/2024 📅

Due Date *

12/31/2024 📅

SMART Goal

Title *

Quality of Work: To enhance the overall quality of work, the objective is to reduce errors by 10% by June 31, 2024.

Description *

Over the next six months, my primary goal is to elevate the overall quality of my work by reducing errors by 10%, with the target completion date set for June 30, 2024. The success of this endeavor will be measured through consistent tracking of errors per project, that I will track. The number of redlines per document received back for review. Progress towards the 10% error reduction goal will be assessed monthly throughout the quarter, enabling timely adjustments and improvements.

Actions:
1. **Implementation of Self-Check Process:**
   - In collaboration with Dale, Eng. Tech. , I will establish and implement a standard self-check process to understand and integrate effective self-check procedures.
   - The self-check results will be presented at each monthly project review, providing a comprehensive overview of error identification and mitigation.
2. **Checklist Integration:**
   - I commit to consistently incorporating the comprehensive checklist for each project from the shared drive, ensuring its use on every project.
   - Results of checklist implementation will be presented at each monthly review, showcasing adherence to quality standards.
3. **Leveraging Peer Reviews for Quality Assurance:**
   - I will integrate peer reviews into my quality assurance process by reviewing the designated peer reviewers and allowing sufficient time for thorough assessments.
   - Peer review outcomes will be considered before submitting projects as 'ready for review' or 'complete,' ensuring a collaborative approach to error reduction.

All of these actions will be seamlessly integrated into the monthly project review cycle, facilitating continuous improvement and ensuring that the goal of reducing errors by 10% is met by the specified deadline. This proactive approach aligns with my commitment to delivering work of the highest quality.

Start Date

1/1/2024

Due Date *

12/31/2024

SMART Goal

Title *

Productivity- Enhancing Productivity Through Time Management Training, Mentoring and Feedback from Supervisor by 12/31/2024

Description *

| **B** | *I* | U | S | I_x | | ≡ | ≣ | | ≡ | ≡ | | ABC✓ |

Over the next year, my primary goal is to enhance my productivity by acquiring a foundational understanding of time management through accessible learning methods. The success of this endeavor will be measured through the completion of webinars, mentor feedback, successful application of time management principles to real projects, and feedback from supervisors.

- In the first two months, I plan to enroll in a Fundamentals of Time Management course. By the end of the first quarter of 2024, I will meet with my supervisor to share my new knowledge and implement agreed-upon strategies.
- I will set up three 1:1 meetings with Dale, Eng. Technician, who possesses strong time management skills. We will meet three times by the end of April 2024. Following each meeting, I will engage with my supervisor to share insights and determine actions to implement.

Throughout the year, I will apply my newly acquired knowledge to my real-world projects, seeking regular feedback from both my mentor and supervisor. By the end of the year, I aim to successfully complete the time management training, demonstrating tangible improvements, and receive positive feedback from both my mentor and supervisors on increased productivity.

Start Date

1/1/2024

Due Date *

12/31/2024

Communication

Customer Service

Dependability/Initiative /Attitude

Flexibility/Adaptability

Job Knowledge

Judgment/Decision Making/ Problem Solving

Productivity

Quality of Work

Self-management

Teamwork

Expectations

7

Resourceful
Innovative Knowledgeable Candid Conversations Accurate
Commitment True Relationships Bring Quality Employee Growth
Our People Honesty Focus
Culture Community Involvement
Respectful Employee Genuine Relation
Building Talent Development Professional Development Valued
Quality Work Responsive Dependable Accountable Engineering Answers Our Customers
Profitable Authentic Customer Needs Solution Focused Service Get-It-Done Attitude Work Ethic Service Sustainable Engineering Real Relationships Our Comm
Fair Client-Fo
Partner Experienced Leadership Loyalty Professional Collaboration Relationships Pride in
Trustworthy Profitable Likeable Understanding Sustainable Growth

Action Items

- Complete your self-review by your supervisor requested deadline
- **Use the training**
- Time for Completing your review goes to Human Resources

After the review - Update your goals in Cornerstone as you have updates

Time for this training goes to training

All Employee Training

Performance Review Process

1 - SUPERVISOR

Dec. 1 - Review opens
Complete 1st Pass by
1/12/24

1 - EMPLOYEE

Self review kicks off
Employees will be
notified Dec 7, 2023.
Have 35 days to
complete their self
review

2 - INDIRECT MANAGER

The indirect manager
will have 10 days to:

Option 1:
Review and Rate

Option 2:
Review Only

Option 3:
Do nothing

3 - HR REVIEW

HR (Nicolette or Tom)

HR will review.

HR will meet with
managers in this stage if
there are needed edits.

Verify who will be in the
review session at this
stage.

*HR Reviewer can revert
steps back if needed.

4 - SUPERVISOR

Makes final edits before
delivery.

Taking into account the
Indirect Manager
feedback/ratings if any
and also the Employee
Self- Review /Goals

Prints Copies for the
Review Session

5 - DELIVERY

Meets with the
employee to go over the
performance review
with all agreed upon
parties before
February 28, 2024

*Note that there has to
be an independent 3rd
Party (Nicolette/Tom)

5 - SIGNATURES

Manager electronically
signs

Manager can make any
final post conversation
tweaks before signing

6 - SIGNATURES

Employee re-reviews all
the documents then
electronically signs

Crafting a well-thought-out self-review helps in creating a compelling professional narrative.

It allows you to tell your story, showcasing your contributions, growth, and commitment to excellence.