

Hello, and thank you for joining this training on how to complete a self-evaluation in Workday. You'll find this similar to how it was completed last year, but there have been some updates we want to share with you. Right now, we're looking at a training platform in Workday, and I am signed in as a staff employee named Elaine. As you can see, this is her inbox, so she has some tasks. And, the first task is a self-evaluation for staff review FY 24, and the effective date for this is the end of the fiscal year. Here is some welcoming text. It's a self-evaluation guide, so welcome this year. Before you begin, there's some advice here to allocate time to focus on this evaluation. Also, it allows you or reminds everyone to approach the evaluation with honesty and specificity to highlight your unique insights, which are valuable to this process because self-evaluation is the groundwork for a meaningful discussion with your supervisor for your role and review of your work at Montgomery College. Follow by that are the evaluation sections that we'll be working through and some help if you need some. Here is access to the help desk information for Human Resources Strategic Talent Management. Our phone number and then also some points of contact if you want to look up the HRCs directly. So, let's get started.

So, when we start... when we click Start and get started, as you can see on the right-hand side, actually on the left-hand side, I'll zoom in, you have what steps we'll do. This is the self-evaluation. The timeframe from last July to this June 24, so it's one fiscal year, and it will have your name here also. Down on the...excuse me... down on the left-hand side are tabs that identify where in the process you are. So, we'll start with primary work responsibilities. There'll be a required training affirmation. There'll be a review of individual performance goals if they are put in Workday, followed by competencies, feedback on competencies, an opportunity to discuss, and update professional development goals. There'll be an opportunity to review feedback that's been provided, if at all, in the Workday system. There's always an opportunity to update support documents throughout, that you've received throughout the year to support your review. And then, of course, there'll be an overall rating. So, if we start back where we are here, primary work responsibilities, as we can see, we got some help text up here. Here also is a link to the ratings descriptions and also to the MC, the Montgomery College HRSTM website for Performance Management if you need to look something up; it's all right here.

The first questions you will see, there are two and they do require comments. So, as you can see based on job responsibilities, please comment on what has gone well. Please indicate the most notable accomplishments, then followed by, were there any Performance challenges or concerns? If so, please provide details. So, there you go, you get to add in some perspective for the employee self-evaluation. On top of that, you would click on a rating and identify a rating that you think fits your work for the year. As you can see, as you select a rating, the description of that rating self-populates. So, if we started with exceptional, we would see that it changes, and then if you go down to exceeds, it changes the description of what's meant by that, and then fully meets, and so on. So, that's the first set of questions.

The next set of questions you can click over on the left-hand side, or you can just click the next button. That's about annual required training. This year, we are asking every employee to affirm that they have, yes or no, completed the required annual training. Links to what courses are required are here at the top in the description and links to taking those classes in Workday are here also up top in this help text in this description box up top. If you click yes to this, you do not need to make a comment, and if you click no, we request that you express some kind of explanation as to what courses are currently pending and how you plan to complete them. So, we'll say yes, being positive, and then click on individual performance goals. So, individual performance goals here is an opportunity to update any goals. If there are no goals listed, then they will not impact your rating negatively. How this works is that the primary work responsibilities, individual performance goals, and competencies are all one-third. But if there are no goals, individual performance goals in Workday, and the competencies and the primary work responsibilities default to 50/50 each. Required Training Affirmation does not carry weight, but we do want people to affirm officially whether they've completed the required training. So, in regards to the required performance, the individual performance goals, we'll look down, you can see that's worth, she's... there's not, in this example, in this training environment, there's no goals listed, so if you have no goals listed, you won't have to rate, and then that will then default the other two primary work responsibilities and competencies to 50%. In this case, we'll just click next, and it'll go to competencies.

This year, in regards to competencies, we wanted to make sure people were making the connection between our College competencies and how we get work done and link them to our Montgomery College's Mission, Vision, and Value statements. In doing so, we request that you look at this Mission, Vision, and Value statements below as you rate your competencies. In addition to that, there is a link to our ratings page in the HRSTM performance management website here for your reference. As you can see below, each competency will be described, and you'll have the opportunity to select a rating for that. As above, the rating description will self-populate as you go along. Each competency requires a rating, but each individual rating or each individual competency does not require a comment.

The next section is a space where we'll be able to add comments on these ratings. I am selecting these at random just to demonstrate how the description changes as you select different ratings. Now when you get down to the bottom, you can see the overall weight is here: 33.34. That is there and it'll default to 50/50 when it does the math since there are no performance goals.

If there are performance goals, then it will be 1/3. Here, the calculated rating comes to exceeds, and the description is there. We click the next button. And it says please provide additional insights into your competencies. This might include examples of how you have demonstrated these skills or areas where you're actively working to improve.

So, there's two questions here: one, provide feedback on company strengths. These are required, and then provide competency-related opportunities for growth, where is space that you would like to, in regards to how we get our work done our College competencies, as rated above how we would like to improve and skill build in that space. That is followed by professional development goals.

So, professional development goals are not performance goals; they're goals of well, what do I want to do? What am I trying to learn? How can I get better at my job? What is there a career path that I'm trying to work on? It's more individual, and this is the perfect opportunity for you and your direct supervisor to have a conversation about where you want to go, how we can set you up for success at Montgomery College, and what tools and resources and benefits are available to support your personal path. That is followed by the opportunity to if there were so in this example in this learning environment, we don't have sample goals, they would automatically populate here if there were goals. The next item is feedback. Feedback automatically populates; it is sometimes collected throughout the year and requested from different people. It automatically populates in this space if there were any feedback within the time period of the review. And don't forget over here we see the time period of the review. That is followed by supporting documents.

So as part of your self-assessment, you can upload supporting documents. It includes any certifications, classifications, personal development courses, emails, kudos, what have you or something you want to attach, anything you like to attach to your performance review. Here is your space to do so. It will upload, and then when your manager does your performance review, they will be able to review those documents. Also, it'll also then permanently keep it there connected to your performance review. That is followed by the overall rating.

As you can see in this case, the calculations came to fully meet performance. Since there were no goals in this example, the other two components would have been 50/50 each, primary work responsibilities and competencies. As you can see, this final section also provides an opportunity to add comments, but this is not required. Any further remarks, this space is available for you to highlight any aspects of your performance or contribution where you feel were not fully captured previously.

So, it's an opportunity to ensure the self-evaluation comprehensively reflects your achievements and experiences throughout the year. We want to make sure that if you have more specific performance primary work responsibilities and comments that should go up there, but this is just an extra spot just in case you felt like something wasn't captured or you didn't have the space to capture something that was important.

That is followed by just a review. As you can see here, we are on the left-hand side. I'll zoom out a little bit so you can see this better. So, you can see we're down here by, we did the overall rating, now we're down the review. We go down, it has the, uh, the overall

primary work responsibilities on top followed by the training. We've said yes, we did finish all our training, the performance goals are there. The ratings here are for the competencies. Followed by the employee summary for the competencies, any feedback in regards to the competencies. Here's the whole review with the overview and then submit.

There we go. as we can see. the next up is her direct supervisor and her inbox is now empty. That concludes our training on how to complete an annual self-evaluation in Workday. Thank you so much. If you have any questions, please reach out to the HR help desk or to your individual HRCs as needed.