Faculty Annual Evaluation
Workday Job Aid

BEFORE YOU BEGIN:

Comments/Feedback: You will have the option of typing in or copying and pasting text into your Self- Evaluation, 1) under each individual competency rating, and 2) in the overall performance rating section, and 3) uploading a Word or PDF file under the Supporting Documents section. Furthermore, you will be able to add or upload comments/feedback once you receive your performance evaluation from your supervisor.

Goals: You will also have the option of recommending goals for your professional development.

STARTING YOUR SELF-EVALUATION IN WORKDAY:

Human Resources will begin the performance evaluation process in Workday. You will receive the Self-Evaluation task in your Workday inbox.
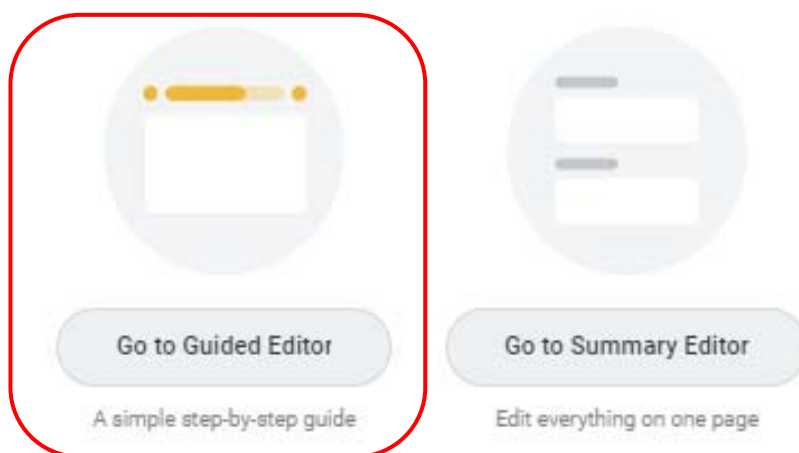
1. **Log in to Workday**.

2. **Navigate to your Inbox:** You can view the Self-Evaluation task in your inbox or on the home screen or click on the Inbox icon in the top right of the screen (between the notifications bell icon and your profile image).

3. **Start the Self-Evaluation**: You can choose to complete the Self-Evaluation using a Guided Editor or a Summary Editor. For step-by-step instructions, we recommend using the Guided Editor. Click on the corresponding button to start. These instructions will follow the steps in the Guided Editor.

4. **Competency Ratings**: Next, you will rate yourself on a set of competencies. Each competency will have a description. To select your rating, click on the Edit icon in the top right button or anywhere within the competency section.

Competency

KGI - Student Satisfaction and Engagement (A1)

Category

Teaching

Description

Class is well-received by students. Instructor appears well prepared for class sessions. Instructor demonstrates mastery of the subject, is enthusiastic, and engages the students. The instructor respects student's opinions and questions and is available to answer questions

Employee Evaluation

Rating

Comment

RATING SCALE:

Highly Effective	Contributions and high quality of work are widely recognized. The majority of performance outcomes routinely and consistently exceed defined expectations, producing important and impactful results for the Institute through planning, execution and creativity. Projects and objectives are completed in a manner that expands the scope and impact of the assignment.
Successful & Effective	Successful in performing the majority of job responsibilities and making a solid, reliable and meaningful contribution to the Institute. Performance is competent, efficient and effective along established expectations. Initiative, resourcefulness and good judgment are consistently exercised.
Some Improvement Required/Some Success	Performance is effective in some areas, there are other areas in which performance is inconsistent or falls below established expectations.
Significant Improvement Required	Performance is not acceptable in critical areas of the job and falls below minimum expectations. Significant improvement is needed. A performance development plan is recommended that defines performance objectives and strategies for achieving success.

5. **Select a rating** from the drop-down menu under **Employee Evaluation**. In the Comment section, type in text to provide examples or an explanation for all ratings.

Competency

KGI - Student Satisfaction and Engagement (A1)

Category

Teaching

To SAVE your rating, click on the Checkmark icon or you can click the Return Arrow icon to cancel your selection. Select a rating for every competency.

Description

Class is well-received by students. Instructor appears well prepared for class sessions. Instructor demonstrates mastery of the subject, is enthusiastic, and engages the students. The instructor respects student's opinions and questions and is available to answer questions

Employee Evaluation

Rating

select one ▼

Comment

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6. **Competencies Summary**: After each Competency Category (Teaching, Scholarship, and Service) you will reach an "Overall Summary" section. **Select an Overall Performance Rating** from the drop-down menu. After all the competencies have been completed, you will reach the Summary section. Select an "Overall" rating from the drop-down menu.

Summary

Employee Evaluation

Rating

Successful and Effective

Once you have completed evaluating each competency, click on the Next button at the bottom of the screen to continue.

Next

7. **Goals**: You have the ability to recommend goals to your supervisor that you would like to set for your position. Click on the Add button to do so.

A Member of The Claremont Colleges

Goals ⌄

Add

a. **Option 1: Select an Existing Goal**: If you have an existing goal that was assigned to you previously, you can select it again by clicking on the **Use Existing Goal** check box. A drop-down menu will appear showing all the goals previously assigned to you that are available for you to select.

Use Existing Goal
☑

> **NOTE:** If you select a goal from the **By Category** menu, ensure that the label starts with "KGI." Not all goals may be available to KGI.

b. **Option 2: Create a Goal**: Create your own goal by completing the fields in the Goal section. Please note that two fields are required: Goal and Rating.

    i. In the Goal text box, give the goal a descriptive label or name (such as "Document New Process Workflow" or "Create Request Tracking Form").

    ii. In the Description text box provide a description of what the goal entails. (Optional)

Goal ✱

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Description

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8. Goals Continued – for both Options 1 and 2:

- Category (optional): Allows you to designate the goal as a Department Goal, Division Goal, Individual Goal or Organizational Goal, if applicable. Be sure to select a category that begins with "KGI."

- Due Date(optional): Enter if applicable.

- Status (Optional): In this drop-down menu, select the appropriate status from the full available list, which includes: "not applicable", "not started", "in progress", "completed" and "incomplete". *Note:*

Some statuses are intended for existing/ongoing goals.

- Rating (Required): In this drop-down menu under Employee Evaluation, you must rate yourself on goals using the same four-point scale used for the competencies.

- New Goals: If you are recommending a new goal, set your Rating to "Not Applicable."

Category

[☰]

Due Date

[MM / DD / YYYY 📅]

Status

[select one   ▾]

Employee Evaluation

Rating

[select one   ▾]

   a. Saving Your Goal: Select the Checkmark icon in the top right to save your goal.

Use Existing Goal

[ ]

Goal *

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   b. To add more goals, click on the **Add** button again and repeat the steps above.

   c. Once you are done adding goals, click on the **Next** button to continue.

9. Overall Performance Rating – Comments: In the next screen you will see the Overall Performance Rating again, this time with a Comment section. Click on the **Edit** icon to type in a comment or copy and paste text from a document you have already created.

Overall Performance Rating ∨

Employee Evaluation

Rating

Successful and Effective

Comment

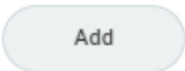Click on the **Next** button to continue.

10. **Supporting Documents:** You can upload a Word or PDF file if you wish to provide a statement of additional comments or feedback, or any other documents relevant to your performance evaluation. To do so, click on the Add button under "Employee" (see below).

Supporting Documents ⌄

If there are any supporting documents to the performance evaluation that you would like to include as part of the performance review, please attach them here.

Employee

Add

11. **Supporting Comments:** If you wish to provide additional comments or feedback relevant to your performance evaluation. Please see options below.

    a. <u>Summary - Final/Additional Comments</u>: You can add final/additional comments under the Employee Evaluation section, in the Comment text box (see below). To do so, click on the Edit icon on the right.

Summary

Employee Evaluation ✏️

Comment

    b. Type or copy and paste text into the Comment box. Click on the Checkmark icon in the top right to save the comment.

Employee Evaluation   ↩ ✓

Comment

Normal ⌄ | **B** | *I* | <u>U</u> | A ⌄ | ☰ | 🔗   ↗

Sample comment here.

    c. Click the Next button when you are finished.

Next

12. **Completing Your Self-Evaluation**: You will see a summary of your entire Self-Evaluation on the following screen.

Complete Self Evaluation

Self Evaluation: KGI Annual Performance Evaluation for Faculty

    a. Scroll down to review each section. You can still make edits by going to the corresponding section and clicking on the Edit icon (pencil icon).

    b. You can Submit, Save for Later or Close the Self-Evaluation. If you "Save for Later" or "Close," you can return to the task at a later time by looking in your Workday Inbox.

> **Submit**   Save for Later   Close

13. Submitting Your Self-Evaluation: When you are ready to complete your Self-Evaluation and forward it to your supervisor, click on the **Submit** button and then on the **Done** button.

NEXT STEPS:

1. **Performance Evaluation by Supervisor:** Your performance evaluation will appear as a task in your supervisor's Workday Inbox. They will rate you on the same competencies on which you rated yourself and will see your self-ratings. In addition, they will see the comments/feedback, and proposed goals you submitted on your Self-Evaluation.

2. **Review Meeting**: Once your supervisor has completed your evaluation, your supervisor will provide you with a copy of your Performance Evaluation and will schedule a time to meet with you to discuss it.

3. **Acknowledgement & Additional Comments:** After you have met with your supervisor, they will forward your Performance Evaluation to you in Workday. Your Performance Evaluation will appear in your Workday Inbox and you will be able to add comments/feedback and you will be required to acknowledge that you have received the Performance Evaluation.
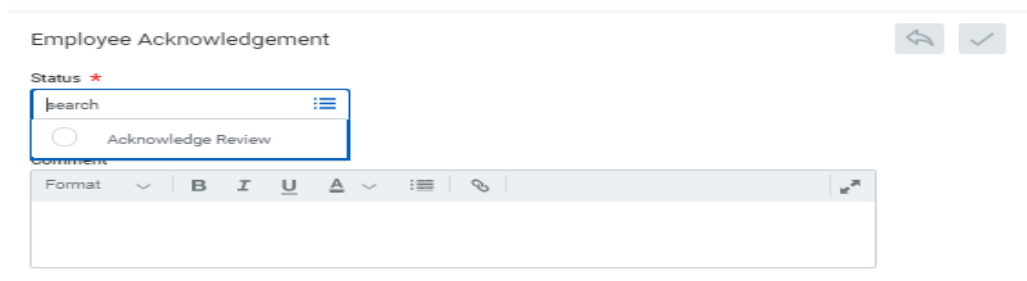
Acknowledgement

Employee Acknowledgement

Status *

Comment

    a. **Acknowledgement:** After you have read the acknowledgement statement, click on the Edit icon, click on the Status drop-down menu and select *Acknowledge Review* to acknowledge your performance evaluation.

Acknowledgement

b. **Comments:** You can type in or copy and paste text into the Comment section. Click the **Checkmark** icon to save your acknowledgement and comments.

c. **Review Performance Evaluation:** You can scroll down to review your supervisor's evaluation of your performance. The competency ratings and corresponding overall performance rating from your supervisor will appear side-by-side with your self-ratings and overall performance rating.

d. **Submit Acknowledgement & Additional Comments: When** you are finished, click on the **Submit** button. The evaluation will be sent back to your supervisor with your acknowledgement and comments (if any), so that they may complete *their* acknowledgement.

e. **Finished!** You have completed the staff performance evaluation process.