

End of Year

Performance Cycle Preview

For HR Partners

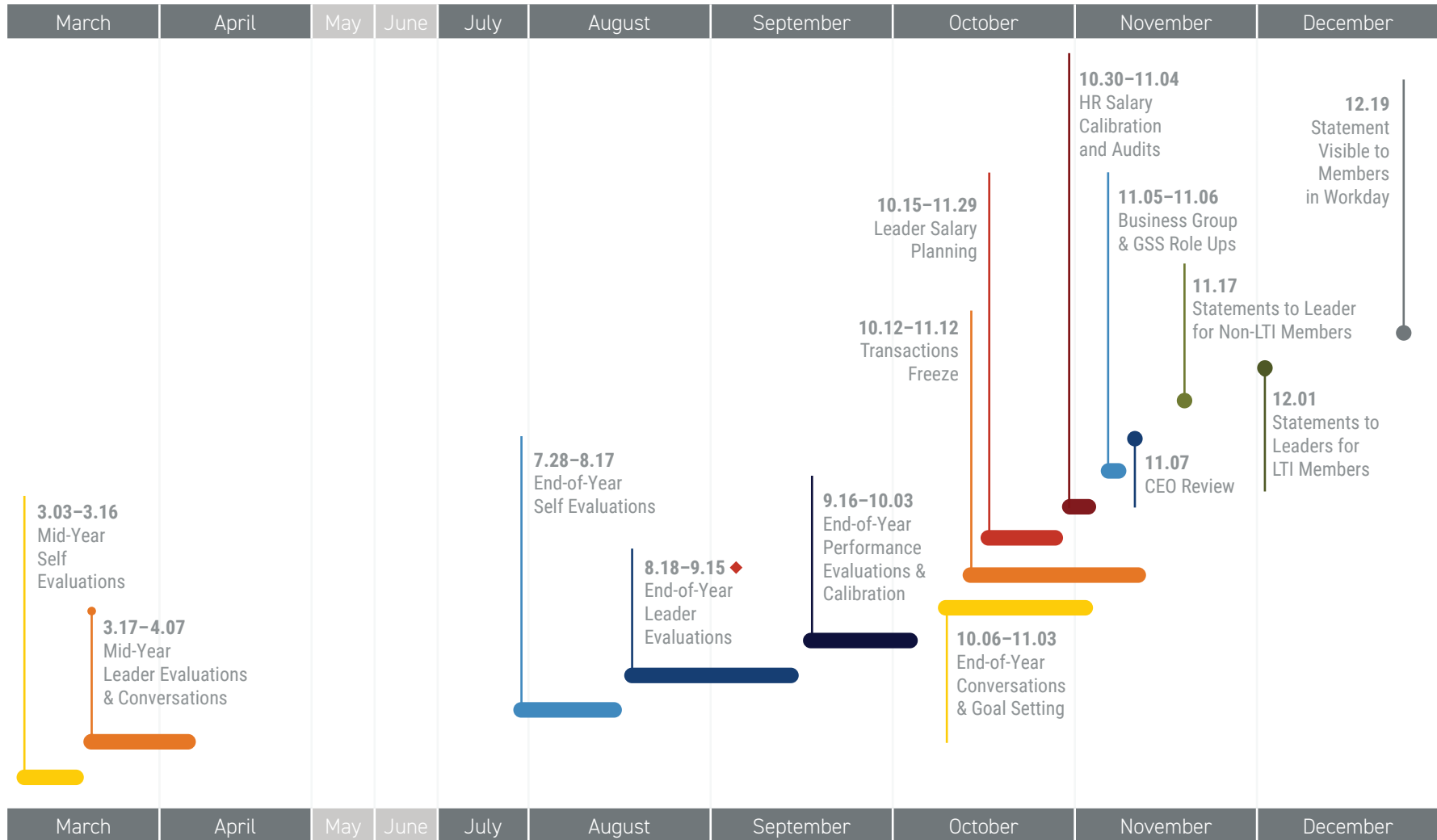


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THE PERFORMANCE CYCLE

In FY25, leaders and team members can anticipate the full Performance Cycle as introduced in FY24. This includes ongoing performance conversations with formal conversations at Mid-Year and End-of-Year. There will also be different performance review templates for Production and Non-Production Team Members.



◆ Task is due at 8am MST

RESOURCES & COMMUNICATIONS

Talent Development has resources for Performance Evaluations, Conversations and Goal Setting that are available to you. The objective of these resources is to equip you to help team members and Leaders prepare for a meaningful EOY Performance Cycle. These can be found on our SharePoint site:

[Talent Development Resource Page.](#)

Communications will be posted on Upward at each step of the process. However, additional communication slides can be provided for you to use at your site as you see fit. If you have electronic or paper bulletin boards, you are welcome to edit to fit your timelines as you see fit. We strongly encourage you to communicate to your team members and leaders regarding the performance cycle, and training and resources available to them.



ROLES AND RESPONSIBILITIES

**HR Partner**

- Prepare leaders and team members for success in the EOY process by communicating:
 - Resources, including host trainings for leaders and team members on EOY evaluations and conversations
 - Timeline
 - Expectations
- Support leaders in aligning evaluations with performance ratings
- Facilitate calibration sessions and partner for alignment across the organization
- Provide site/region specific communication via local comms channels

**Talent Development COE**

- Manage the global EOY Performance process, timeline, and systems
- Provide Preview sessions for HR Partners
- Provide additional resources and be available to answer questions as they arise
- Provide On-Demand Training for team members and leaders on Goal Setting
- Meet with HR Leaders to review finalized ratings and distributions
- Provide broad communications for each process step via Upward

**Leaders**

- Ensure team members have been provided ongoing performance feedback, and formal feedback at mid-year and end-of-year
- Input EOY ratings in line with team member's performance
- Provide facts, data, examples, and strong rationale to support team members' ratings
- Follow the timeline closely and ensure evaluations and ratings are submitted in a timely manner
- Attend and give input in calibrations sessions scheduled by your HR Partner

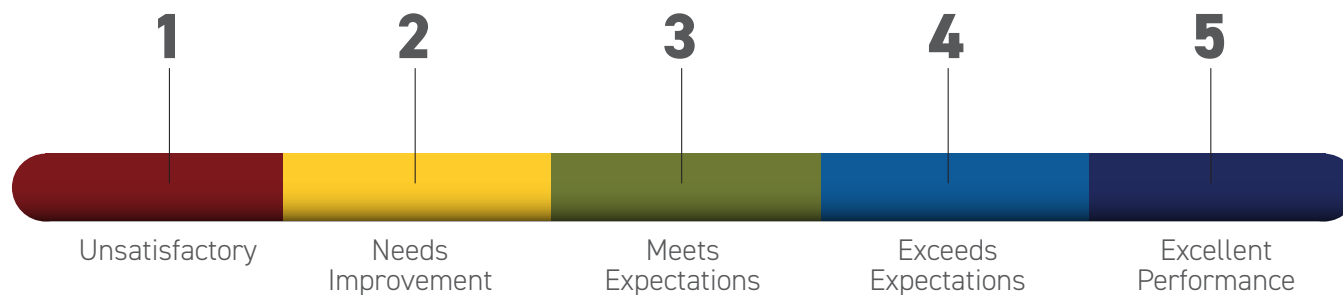
**Senior Leadership Team**

- Encourage team members to fully participate in the End-of-Year Performance cycle. Role model the behavior you expect.
- Follow the timeline closely and ensure their team's evaluations and ratings are submitted in a timely manner
- Review and calibrate rating decisions across the organization in partnership with HR and leadership team
- After calibration, ensure changes are communicated to the appropriate leader and explain the rationale

5 POINT RATING SCALE

The 5-Point Rating Scale allows for clearer differentiation in team member performance. Below are the 5 rating categories explained.

- 1. Unsatisfactory:**
Performance falls significantly below expectations. The individual demonstrates fundamental deficiencies in the skill or competency being assessed, requiring immediate attention and improvement.
- 2. Needs Improvement:**
Performance is not meeting expectations but shows some potential for growth. The individual displays weaknesses or areas for development in the skill or competency, requiring focused efforts to improve and meet expectations.
- 3. Meets Expectations:**
Performance meets the expected standard for the role or task. The individual demonstrates proficiency in the skill or competency being assessed, meeting the requirements.
- 4. Exceeds Expectations:**
Performance goes above and beyond what is expected. The individual demonstrates a high level of proficiency and consistently exceeds the standard for the skill or competency.
- 5. Excellent Performance:**
Performance is outstanding and exemplary. The individual consistently demonstrates exceptional skill in the area being assessed, setting a standard of excellence for others to follow. Their performance significantly contributes to the success and goals of the organization.



	1	2	3	4	5
	Unsatisfactory	Needs Improvement	Meets Expectations	Exceeds Expectations	Excellent Performance
RESPECT	Demonstrates a lack of consideration or empathy towards others' perspectives, feelings, or needs. Frequently dismisses or ignores the input of others.	Occasionally demonstrates respect for others, but inconsistently. Sometimes fails to acknowledge or validate the opinions and experiences of individuals.	Consistently demonstrates respect for the individual by actively listening to others, considering diverse perspectives, and showing empathy. Treats others with dignity and courtesy.	Consistently goes above and beyond in showing respect for individuals. Demonstrates exceptional empathy, actively seeks to understand different viewpoints, and consistently treats others with kindness and consideration.	Sets a benchmark for respect in all interactions. Demonstrates unwavering empathy, actively fosters an inclusive environment, and consistently goes out of their way to support and uplift others.
EXAMPLE	John is a GM who frequently dismisses his subordinates' opinions and ideas during team meetings. He tends to interrupt them, and when they try to explain themselves, he does not listen to their arguments and instead imposes his own views. As a result, his colleagues often feel disrespected, and their morale is low.	Sarah is a communication professional who usually listens to her colleagues during team meetings. However, at times, she interrupts them or dismisses their ideas without acknowledging their contributions. Although she means well, her colleagues feel that she sometimes lacks empathy and does not value their opinions.	Tom is a team leader who consistently shows respect for his colleagues. He actively listens to them during meetings, considers their perspectives, and validates their opinions and experiences. He creates a safe and inclusive environment where everyone feels heard and valued.	Liz is a senior HR manager who consistently demonstrates exceptional respect for her colleagues. She shows empathy towards them, takes the time to understand their viewpoints, and goes out of her way to support them. She is known for her kindness, consideration, and unwavering commitment to creating an inclusive workplace.	Sal is a Supervisor who sets an example for respect in all interactions. He fosters an inclusive environment where everyone feels valued and respected. He actively listens to his colleagues, considers their perspectives, and consistently shows kindness and consideration towards others. He is known for his exceptional leadership and commitment to creating a positive workplace culture.

WORKDAY END-OF-YEAR PERFORMANCE PROCESS FLOW CHART

