

Annual Planning Cycle

Although it varies across schools and departments, in general the annual performance management process coincides with the fiscal/academic year and looks like this:

Step	What Happens
1	<p>Goal/Priorities</p> <p>Typically toward the beginning of the fiscal year, managers and staff sit down to discuss goals and priorities for the upcoming performance period and then document their conversations in the performance management section of PeopleSoft. Ideally, before these conversations occur, departments and teams have set and communicated goals for the year ahead. This makes it easier for managers and employees to discuss how individual priorities and goals align with those of the organization.</p>
2	<p>Competencies</p> <p>The PeopleSoft system allows managers to optionally select competencies for discussion (<i>how</i> work gets done) along with their employees' priorities and goals (<i>what</i> work gets done). Schools and units may choose to identify specific competencies that they consider essential to every employee's performance and impact. Independent of, or in addition to, any school- or unit-wide competencies that have been identified, managers may, in consultation with their employees, select competencies important to their specific role – or they can opt not to include defined competencies in the performance management process.</p>
3	<p>Feedback</p> <p>At any point during the performance period, schools and units may opt to conduct a feedback process in which employees can nominate and managers can select key stakeholders to offer their perspective on the quality and impact of the employee's work. Feedback can be gathered using the 360° tool in PeopleSoft or simply by gathering comments via email that can be summarized and then cut and pasted into the PeopleSoft system.</p>
4	<p>Annual/Summary</p> <p>At the end of the performance period, managers and employees meet to discuss progress made as well as any changes that may have shifted the priorities and goals discussed at the beginning of the performance period. This last conversation is also documented in PeopleSoft following the conversation.</p>