

Harvard Library
Performance Management

FY23 Year-End Review & FY24 Goal Setting

Workshop for HL/HCL Managers and Staff, May 2023

Harvard Library Human Resources

Agenda

1. FY23 Performance Management and Timeline
2. Overarching Goal for Year-End Discussions
3. Year-End Discussion
4. Documenting the Discussion
5. Resources and Tips
6. Target Dates



Big picture

- Last fall, staff worked with their managers to set SMAT goals.
- Those SMAT goals were reviewed, updated, and adjusted throughout the year.
- In **May and June**, managers and staff will meet to discuss progress made as well as changes that shifted goals through the year. This conversation is documented in PeopleSoft.



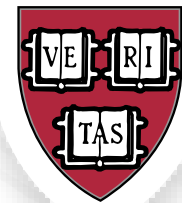
Timeline



Our overarching goal is for managers and staff to:

- discuss progress made on goals throughout the year, including changes that shifted priorities,
- reflect on how progress contributed to the Library's mission and objectives,
- record performance notes and rating in PeopleSoft

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Year-end Review

Discussion (80-90% of focus)

- Review SMAT goals, progress made, adjustments, etc.
- Discuss accomplishments and barriers
- Consider looking ahead to FY24 goal setting (process will be the same as FY23)
- Manager shares performance rating during conversation (this is an important step)

Documentation (10-20% of focus)

- Manager uploads completed SMAT goal form to PeopleSoft
 - Manager adds brief summary (one to three sentences) of year-end discussion and performance rating
 - Manager shares PeopleSoft document with staff member for review and finalization
- 

The discussion is the
most important part of
closing out the
performance year...

Discussion: Tips

- Ask “how do you prefer to receive feedback?”
- Give feedback in “BITs”. Describe the **B**ehavior, the **I**mpact of that behavior, and what this means for **T**omorrow.
- HR is your partner if you have feedback to give and you need help thinking through how to approach it.
- In addition to giving feedback, all managers are encouraged to ask for feedback as well.



Discussion: BITs Examples

- *“During our team meeting, you didn’t speak up (**behavior**). This means the team didn’t get to hear your perspective, which would have been valuable to the conversation (**impact**). During the next team meeting, please come prepared to actively participate in the discussion (**tomorrow**).”*
- *“When you assigned me this project, a timeline wasn’t included (**behavior**). This made me think the timeline was open-ended (**impact**). I’ve learned from this that I work better with a clear timeline and ask that we strive for this going forward (**tomorrow**).”*



Harvard-wide performance ratings


Exceptional
Impact

Contributions have **significant** and **consistently exceptional** impact and value to the department and/or organization. Makes **unique**, often **one-time achievements** that measurably advance progress toward organizational goals....



Full/Consistent
Impact

Consistently demonstrates **meaningful impact** through accomplishments and contributions. This level of impact is reflective of **a fully qualified, competent and experienced individual in this role...**



Learning/Building

Needs to gain proficiency and/or productivity in the position to achieve consistent impact. May achieve some, but not all goals...

Needs
Improvement

The quality of performance is **below expectation** for the role....

Discussion: Looking Ahead to FY24 Goals

- Many staff and managers like to **start brainstorming FY24 goals** in conjunction with the FY23 year-end conversation. FY24 goal setting can be done anytime May through to the end of August. (Four-month window for flexibility.)
- **Same SMAT goals template as FY23.** Can be downloaded from the [performance management wiki](#) and saved locally to capture conversations and planning.



FY24 Focus: Career and Professional Development

Why does professional development matter?

- Learn new skills
- Boost confidence and credibility
- Expand your network
- Contribute to career pathways and advancement

<https://professional.dce.harvard.edu/blog/why-is-professional-development-important/>

There is a Library-wide expectation that all employees continue to grow and learn. Accordingly, all are expected to have development plans.



FY24 Focus: Career and Professional Development

Prioritize Learning & Growth

- Work with your manager to dedicate time to career and professional development activities.
- The amount of time will vary based on the nature of the development opportunity and position needs.

Make a Plan Using SMAT Goals

- Planning will help you take steps to achieve your goals.
- Keep an eye out for additional opportunities through the year to add to your goals.
- Capture growth goals in your SMAT goals form.



FY24 Focus: Career and Professional Development

Remember that professional development opportunities...

- may relate to growth in your current position and/or broader career progression or advancement
- happen in coordination and with the approval of your manager
- adhere to Library policies and financial guidance
- are paid for by local unit funds (reach out to HR if additional funds need to be requested – since the library is committed to professional development, some centralized funds are available!)



Now let's look at how
to document the
discussion in
PeopleSoft...

Documentation

Manager:

- Adds performance comments and rating
- Uploads completed SMAT goals form
- Shares document with employee

Employee

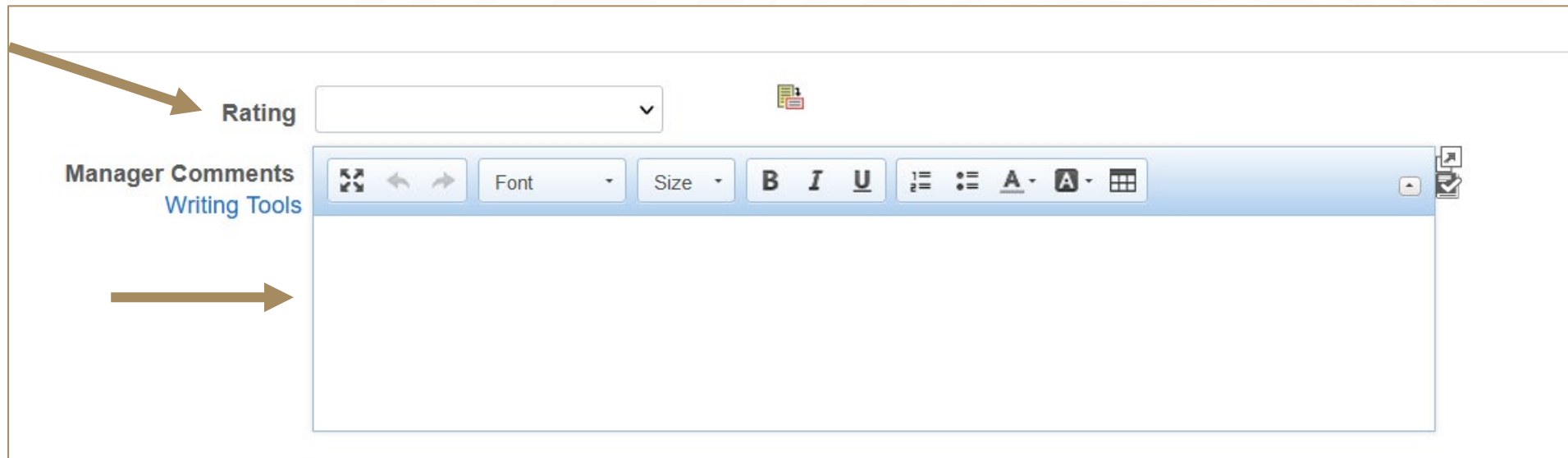
- Adds comments and acknowledges

*The form is to record the discussion.
Essentially, you are confirming what you already know!*



PeopleSoft Process: Managers


- [Peoplesoft](#) > Manage My Team > Team Performance
- Click the “summary” tab
- Select **rating** from dropdown
- Optional: Add a brief summary of the year-end discussion in the **manager comments** section (one to three sentences)




PeopleSoft Process: Managers

- Click “add attachment” to **upload the FY23 SMAT Goals form**. *(This is important because only managers can attach the form. It is "read only" for employees.)*

Attachments	
File Name	Description

 [Add Attachment](#)

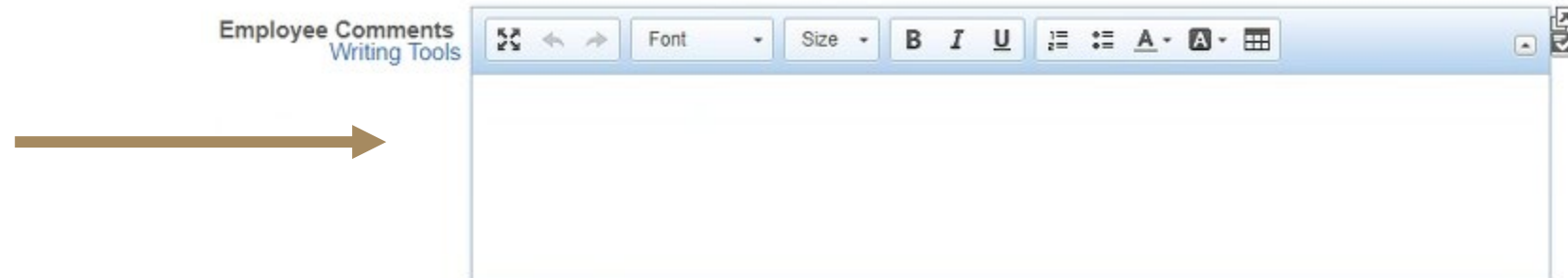


- As the final step, in the upper right-hand corner of the webpage, **click "Complete Annual"**. This finalizes the manager section.



PeopleSoft Process: Employees

- Will **receive an automated email** when performance review is completed by manager prompting review in PeopleSoft. ([Peoplesoft](#) > My Self Service > My Performance)
- **View manager comments** and uploaded SMAT goals document.
- Optional: Add brief comments on year in **Employee Comments** section.
- Click on “**Acknowledge**” in upper right-hand corner.



Target Dates

May and June 2023	FY23 performance management wrap up <ul style="list-style-type: none">• FY23 year-end review discussions take place• Documentation and performance rating saved in PeopleSoft• Aim to have reviews acknowledged and finalized in PeopleSoft by 7/1
May to late August 2023	FY24 goal setting takes place <ul style="list-style-type: none">• Same process and form as FY23• Intentionally broad due date so that teams can determine a timeline that is the best fit for them



Links and Resources (performance management)

- Performance Management Wiki
 - FY23 year-end discussion slide deck and resources
 - FY24 SMAT goal template
- Equity, Diversity, Inclusion, Belonging, and Anti-Racism (EDIBA) Learning Journey and competencies for performance management
- Performance Management Resources for Managers and Staff (FAS)
- Owning Your Own Performance Management: a Guide for Staff



Links and Resources (professional development)

- [LinkedIn Learning](#). Provides you with over 10,000 on-demand courses on workplace skills, computer software, and creative skills and more.
- [Harvard Center for Workplace Development](#). CWD offers dozens of courses (both online and in-person) to help build practical skills for your current role and to support long-term career development.
- [Association of Research Libraries](#). Offers various opportunities, including [webcasts](#), [toolkits](#), [sponsorships](#), and more.
- [OCLC](#). A global library organization that provides a range of events, resources, and opportunities.
- [Library Juice Academy](#). Online professional development resources for librarians.
- [DeEtta Jones](#). Training and development to help learners become the best and most inclusive versions of themselves.



Have questions?

- Reach out to your HR Consultant:
 - **James Estrella**, Senior Human Resources Consultant
 - **Christen Galletta**, Senior Human Resources Consultant
 - **Audrey Harmon**, Associate Director, Human Resources
- For Peoplesoft questions:
 - **Erica Barnes**, HR Coordinator
 - **Valerie Sacchetti**, HR Operations and Administration Manager



Thank you!