



# Cornerstone Performance Pilot: Annual Performance Review

Illinois Human Resources

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## Illinois Human Resources

# Overview

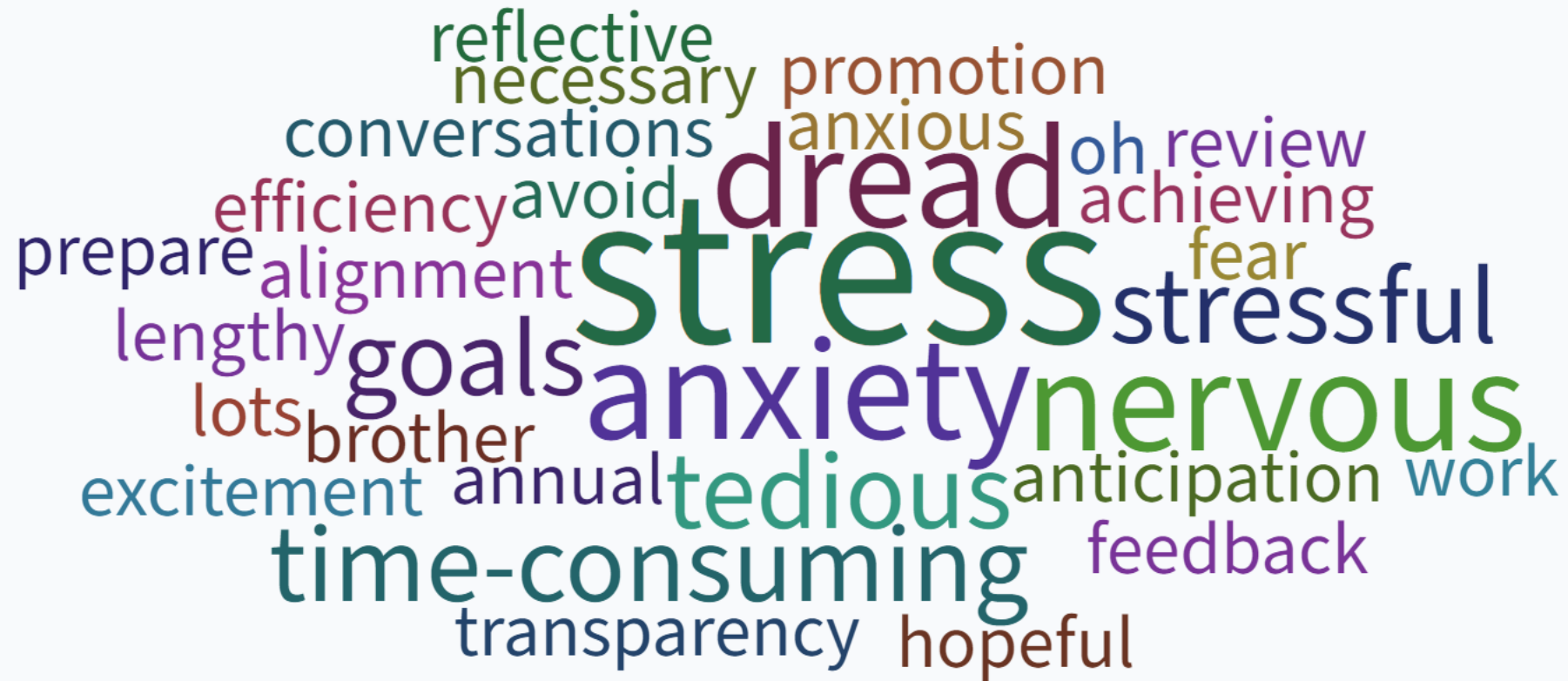


- Purpose of the Cornerstone pilot
- Changes to this year's evaluation
- Overview of the steps to the annual review process
- Writing tips to prepare for the self-evaluation
- Demonstration of the online system
- Importance of the performance conversation



# Quick Poll

In one word, what thought comes to mind regarding conducting an annual performance review?



Instructions Responses More Clear responses

# Purpose



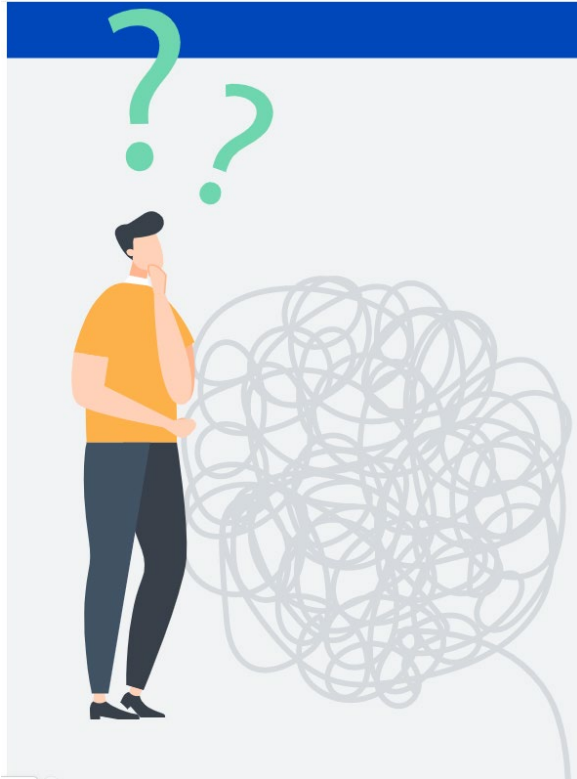
## Pilot

Create a consistent performance management process utilizing an electronic system that includes goals & competencies.

## Annual Review

Help staff learn, resulting in improved performance and personal development.

# Why Cornerstone?



- Provide technology to facilitate the performance management process.
- Increase consistency of completion of annual performance review.
- Offer data retention and reporting capabilities.

# Changes Implemented for Current Pilot



- The performance review period was adjusted to June 1, 2023 through May 31, 2024.
- Reduced the number of competencies to three that tie to the UIUC's strategic plan to simplify the process.
- Developed coaching questions for annual review process.
- Eliminated the numerical rating system for subsections.
- Reduced the overall rating scale to four rating options with definitions



The background of the slide is a faded, orange-tinted image of the Lincoln-Douglas Debates statue, showing three figures in academic regalia. A vertical blue bar is located on the left side of the slide, partially overlapping the text.

# Annual Performance Review Process

# Performance Evaluation Requirements



- A written understanding, between the supervisor and the employee, of the major duties and responsibilities of the job held i.e., a job description, and an agreement on priorities of the duties.
- A supervisor's written statement evaluating current performance compared to expected performance.
- A discussion between supervisor and employee of the evaluation including an understanding of plans and goals for the coming year.
- The employee's signature on the evaluation form to signify that the employee and the supervisor have discussed the contents of the review.
- A final written record by the supervisor of the review, together with any written employee comments, to be placed in the employee's personnel file.

[Provost Communication No. 22: Annual Review of Academic Professional Employees](#)

[Campus Administrative Manual: Performance Review for Civil Service Employees](#)

# Steps for the Annual Performance Review



## Step 1: Employee Self-Review

- Review Job Description
- Update goals from year in review
- Provide personal examples of accomplishments

## Step 2: Supervisor Feedback

- Supervisor will receive self-review
- Gather feedback from multiple sources
- Write comments including data and examples

## Step 3: Performance Conversation

- Review job description
- Discuss challenges and accomplishments
- Set future goals and development opportunities

## Step 4: Final Step

- Employee Acknowledgement
- Submit



# Quick Poll

## Step 1: Employee Self-Review

# What resources do you use to gather information as you prepare to complete an annual performance review?

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Employees goals



- ❖ Work Product
- ❖ Projects and Accomplishments from the past year
- ❖ My professional development
- ❖ Certification completions
- ❖ What I am proud of
- ❖ Job Description
- ❖ Calendar for events involved in
- ❖ Customer feedback
- ❖ Emails from campus partners
- ❖ Praise from clients
- ❖ Projects related to review goals
- ❖ List of projects
- ❖ Customer feedback
- ❖ Successful completion of goals
- ❖ Performance supported by data

# How to Prepare for Self-Evaluation



- Make suggestions for changes to your job description if needed.
- Review and assess your progress toward achieving your goals.
- Draft work & career goals for the next year.
- Review the organization's mission, vision, guiding values and goals in advance.
- Collect documentation you may need to support your evaluation.



# Boldly Illinois: 2030 Strategic Planning

**Our Mission:** The University of Illinois at Urbana-Champaign is charged by our state to enhance the lives of citizens in Illinois, across the nation, and around the world through our leadership in learning, discovery, engagement, and economic development.

**Scholarship,  
Discovery, and  
Innovation**

**Transformative  
Learning  
Experiences**

**Societal Impact**

**Resources and  
Strategic  
Investment**

<https://strategicplan.illinois.edu/>

# Writing a Self-Evaluation



Do:

- Be specific, provide examples
- Be honest and factual
- Use metrics: numbers or quotes
- Accomplishments
- Areas for growth or challenges
- Professional development goals



Don't:

- Be vague or unclear
- Use absolute words such as “always, never, completely, etc.”
- Complain or gossip
- Discuss leave requests





# Three New Competencies

The employee should review the 3 university-wide competencies and provide comments on their work performance in each area as part of their self-review. Specific examples are helpful and encouraged. It is **NOT EXPECTED** that all performance indicators will be specifically addressed with comments.

The supervisor may also make optional comments when reviewing the employee's self-review.



**COLLABORATION,  
COMMUNICATION,  
DEPENDABILITY**



**EMPOWERMENT,  
INITIATIVE,  
JOB KNOWLEDGE**



**INCLUSION,  
COMPASSION,  
CUSTOMER SERVICE**



# Collaboration, Communication, Dependability



*Employee Self-Review Comments:*

*Supervisor Comments (optional):*

- **Active Listening:** Demonstrates a commitment to truly understanding others by actively listening, asking questions for clarification, and providing feedback.
- **Clear and Concise Communication:** Articulates thoughts, ideas, and information clearly and concisely, adapting communication style.
- **Cohesion:** Fosters a positive working environment. Effectively addresses disagreements and conflicts.
- **Dependability:** Fulfills commitments and adapts to changes in priorities while maintaining a high level of productivity.
- **Information Sharing:** Actively shares relevant information, resources, and feedback with team members to facilitate their work and decision-making.
- **Interpersonal Skills:** Displays empathy, respect, and emotional intelligence when interacting with colleagues, clients, or stakeholders, contributing to positive relationships.
- **Judgment:** Acts with integrity and earns the trust of colleagues through reliability.
- **Reliability and Attendance:** Reliably present for important projects, tasks, and events.
- **Team Collaboration:** Works collaboratively with colleagues, valuing diverse perspectives, contributing to group goals, and resolving conflicts constructively.



## Collaboration, Communication, Dependability



James, Building Service Worker, F & S

### *Employee Self-Review Comments:*

I go above and beyond to make sure our team operates at its best, and I regularly provide help and support to team members when working on a collective goal. In February, the sewer system backed up flooding the first-floor residence hall lounge. Our team quickly assessed the situation and worked together to get the area secured and cleaned in record time before students arrived for classes in the morning. The clean up involved several other BSW's from other buildings pulling together to prioritize this effort. I make sure to arrive to each shift early so that I know where first shift has left off and to ensure transition is done smoothly.

### *Supervisor Comments (optional):*



# Empowerment, Initiative, and Job Knowledge

*Employee Self-Review Comments:*

*Supervisor Comments (optional):*

- **Adaptability:** Readily adjusts to changing circumstances, embraces new responsibilities, and maintains a positive attitude even in challenging situations.
- **Adherence to Best Practices:** Demonstrates knowledge of and adherence to industry best practices and relevant regulations.
- **Continuous Learning:** Actively seeks opportunities for professional development and demonstrates a commitment to staying up-to-date in their field.
- **Encouragement of Others:** Encourages and supports colleagues in taking initiative and becoming more self-empowered.
- **Initiative:** Frequently takes initiative to improve processes, solve problems, and contribute to the overall success of the organization. Effectively addresses and resolves job-related challenges, leading to improved processes or outcomes.
- **Ownership:** Takes responsibility for tasks and projects, acknowledging accountability for their success or failure.
- **Resourcefulness:** Seeks out new information, tools, or methods to enhance job performance and achieve better results.
- **Self-Motivation:** Demonstrates a strong work ethic and drive to accomplish tasks without constant supervision.
- **Timely and Accurate Task Completion:** Tasks and projects are consistently completed within established deadlines, and deadlines are rarely missed. Consistently produces work that is free from errors, omissions, and inaccuracies.

## ✓ Performance Conversation



Sara, Technology Staff

Sara is a member of the Technology Staff within IHR. Her supervisor, Dawn, is meeting with her to discuss her performance review. Sara has completed a self-evaluation and shared it with Dawn prior to the meeting. Dawn completed the supervisor portion of the evaluation as well and shared it with Sara prior to the meeting. Sara and Dawn were generally in agreement on the evaluation, except for the **Inclusion, Compassion, and Customer Service** competency.



# Inclusion, Compassion, and Customer Service



*Employee Self-Review Comments:*

*Supervisor Comments (optional):*

- Conflict Resolution and Sensitivity:** Resolves conflicts and disputes with sensitivity and compassion, fostering a positive and respectful resolution for all parties involved.
- Continuous Improvement:** Demonstrates a customer-centric approach in all interactions. Actively seeks opportunities to enhance the customer experience, whether through process improvements or additional training.
- Embracing Diversity:** Demonstrates an understanding of the value of diversity and actively encourages diverse perspectives, backgrounds, and experiences within the team and the organization.
- Empathetic Listening:** Shows genuine empathy toward colleagues, actively listening to their concerns, experiences, and needs.
- Encouraging Equity:** Actively advocates for initiatives and practices that promote diversity, equity, and inclusion within the organization.
- Inclusive Language and Communication:** Utilizes language and communication that is inclusive and respectful of all individuals.
- Proactive:** Anticipates and meets customer needs efficiently and effectively. Resolves customer issues promptly and satisfactorily.
- Supportive Leadership:** Supports and champions the well-being and professional growth of colleagues, creating an environment where everyone can thrive.
- Customer Satisfaction:** Appropriately, timely, and professionally responds to customer concerns that may include quantitative or qualitative data related to client feedback.

## ✓ Inclusion, Compassion, and Customer Service



Marie, Office Manager

### *Employee Self-Review Comments:*

I have made a conscious effort to foster a positive and inclusive work environment by promoting open communication and encouraging collaboration. This has resulted in a more cohesive and motivated team better equipped to meet our organizational goals. In our weekly team meetings, I recognize the contributions and achievement of my team members and create space for them to recognize each other, which elevates the team atmosphere that enhances our customer service centric approach internally and externally to the organization.

### *Supervisor Comments (optional):*

# Developmental Coaching Questions



## Accomplishments and Challenges:

1. What were two of your key accomplishments that you were most proud of this year? Why? (For example, this could include an outcome, improvement in skills, improvement in customer service, etc.) \*
2. Did you encounter significant barriers, challenges, or missed opportunities that impacted your performance or professional development? If so, please describe.
3. What assistance would be helpful from your team or your supervisor to support your success in the coming year?



# Writing Tips for Self-Evaluation



## Key Takeaways

- Your self-assessment is a chance to be your own advocate.
- Track your achievements year-round to make the process easier.
- Include specific examples of any skills learned or goals met.
- Create a plan for your personal growth.
- If you're stuck on what to write, consult a manager and peers for feedback.

<https://lattice.com/library/tips-for-writing-a-strong-self-evaluation-plus-specific-examples-to-make-yours-shine>



# Demo

## Step 2: Supervisor Feedback



# Role Play

## Step 3: Performance Conversation

## ✓ Performance Conversation



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# Overall Rating

## Step 4: Final Step

# Overall Rating Definitions



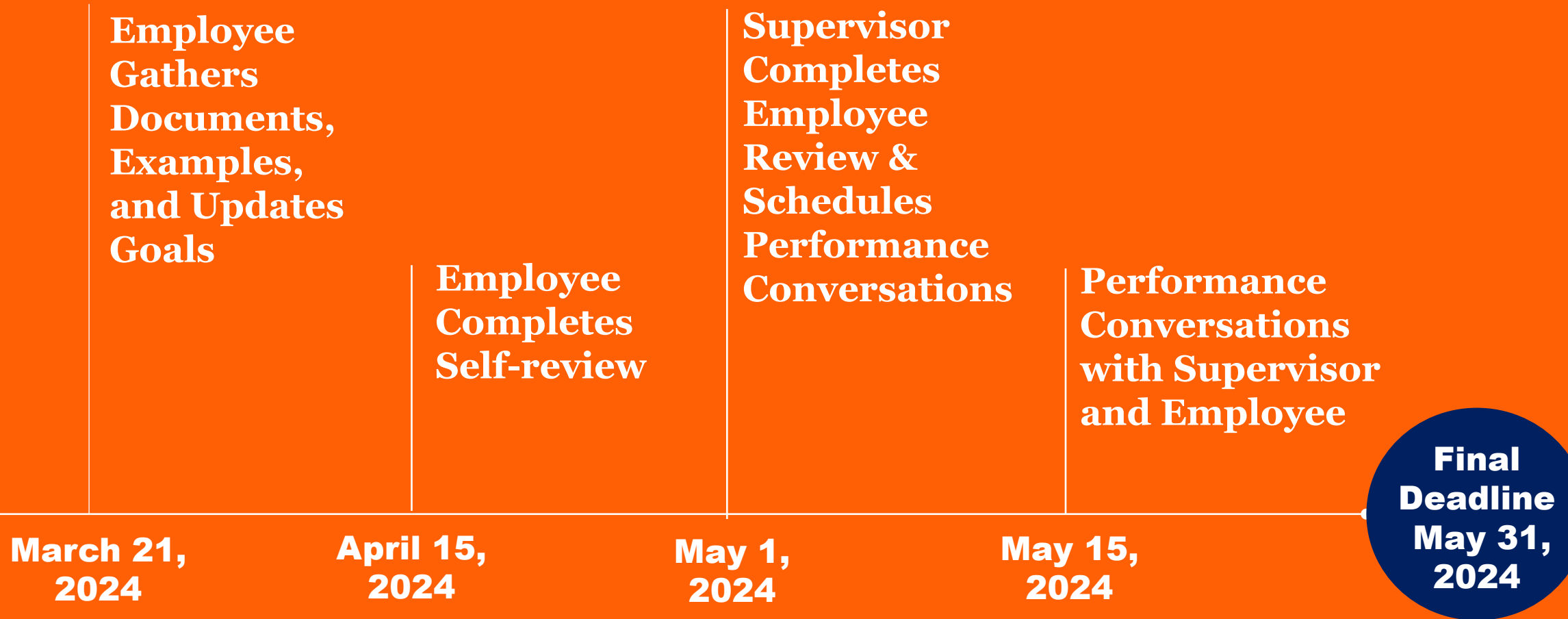
Rating	Definition
<b>Outstanding</b>	This rating recognizes employees who consistently excelled and made a significant and extraordinary impact in the organization. Rare and significant efforts were evident in their performance.
<b>Achieved or Exceeded Expectations</b>	This rating indicates that the employee consistently met or exceeded expectations. It highlights their reliability and ability to deliver quality work regularly.
<b>Developing</b>	This rating acknowledges that the employee made progress and took steps to improve their performance. It signals a positive trajectory and a commitment to growth.
<b>Needs Significant Improvement</b>	This rating indicates that the employee has not been meeting expectations and significant improvement is needed. This signals a negative trajectory and lack of a commitment to grow/develop/change.



# Questions?

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# Suggested Timeline





# Summary



**Annual  
Year End  
Review  
May 31**

- Same process for everyone, same competencies for everyone.
- Employees will finalize goals for this period in the system and complete a self-evaluate by May 1, 2024.
- Annual review is a tool for self-improvement and career advancement
- Supervisors will meet with the employee for a performance discussion before employee signs off.
- Provide feedback to the steering committee on the process using the Cornerstone tool.



Thank you!



**Illinois Human  
Resources**

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