Fairview Performance Review Cycle

Resources for Leaders

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1 Understanding the Performance Review Cycle

Performance Reviews are an important process at Fairview because it helps our employees grow in their careers and helps us retain our talented workforce, allowing us to create transformational change for our team members, patients, and the communities we serve. Performance Reviews may be used, in part, to determine merit-based increases for your team members.

Performance Review Philosophy

As a learning organization, our philosophy is to regularly engage team members to create a strong continuous feedback loop to coach, learn, and recognize performance. Talent Connect is the system that supports this process. Talent Connect includes three optional functions to support the performance review process: self-review, alternate reviewer in limited circumstances, and 360-feedback.

Process Overview

Each year, leaders must perform an annual performance review of every team member, including Level 2 Employees. This is a chance to celebrate the team member's accomplishments and identify opportunities for development and growth.

The graphic below describes our organization's annual review process that we follow in Talent Connect. It is a collaborative process between a leader and a team member to identify strengths and opportunities. See the Performance Review User Guide for technical support.

Performance Review Process in Talent Connect

1 SELF-APPRAISAL (OPTIONAL)	2 LEADER APPRAISAL	3 LEADER APPROVAL	4 1:1 MEETING	5 ACKNOWLEDGEMENT
Every team member can comment on their performance • Work with your leader to set a due date for the evaluation • If you choose to do a self-appraisal, this step must be done first	**Leader evaluates the performance of each team member for the year** • Add ratings and comments to the review form • Collaborate with an Alternate Reviewer in limited circumstances	**Review comments and ratings** • Leader takes one final review before moving to the 1:1	**Share feedback about team members' strengths and opportunities** • Hold 1:1 conversation with team member and leader to recognize performance and discuss development • If you find changes to make to the review, DO IT NOW	**Team Member acknowledges their copy of the review** • The review form is complete • No changes can be made to the form at this stage
TEAM MEMBER	**LEADER**	**LEADER**	**LEADER**	**TEAM MEMBER**

360 Feedback must be anonymized by leader.

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Most Important to Know About the Performance Review Cycle

This big-picture overview can provide clarity and focus.

What is it?	What is evaluated?	Due Date
✓ Completed in Talent Connect ✓ For all employees who were hired September 30, 2024 or earlier ✓ Celebrate success & identify opportunities for growth	✓ Daily work (33%) ✓ Performance to goals (33%) ✓ Fairview Commitments (34%)	✓ Due February 28, 2025 ✓ No extensions

Top Things to Know

1. Everything related to Performance Reviews are completed in Talent Connect.
2. The 2024 Performance Review form is open from November 1, 2024, until February 28, 2025.
    a. **Leaders are responsible for ensuring that all performance reviews are available in Talent Connect by the deadline.** There are NO extensions available.
    b. You must complete performance reviews for each team member you manage.
    c. Collaborate with previous leaders for transferred employees (review alternate reviewer resources).
    d. Leaders with high spans of control can designate an Alternate Reviewer to help provide feedback for team members, especially if you are new to leading your team.
        i. Note: Anyone selected as an alternate reviewer MUST be a people leader (e.g., a charge nurse is not a people leader.

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Tools in Talent Connect

There are multiple tools available to leaders within Talent Connect that can help with the Performance Review cycle.

Self-Appraisal
- ✓ Optional
- ✓ All team members are encouraged to comment on their performance within Talent Connect
- ✓ Comments are shared with leader who responds
- ✓ Due by December 31, 2024

360-Development Feedback
- ✓ Available for use any time in the year
- ✓ Gather feedback from three or more peers and colleagues
- ✓ Inform the team member about themes that emerged from the feedback

Alternate Reviewer

Option to collaborate with other leaders to write reviews if:
- ✓ Leader is on Leave of absence
- ✓ More than 50 direct reports
- ✓ Needs feedback from a previous leader for internal transfers

Writing Assistant
- ✓ Built into Talent Connect
- ✓ Language regarding Daily Work and the Fairview Commitments
- ✓ Additional external document available for leaders to personalize comments to copy and paste

Who is Included in Performance Reviews?

All employees hired before October 1, 2024 are included in the Performance Review process.

Physician & Advance Practice Providers	Step-in-grade Team members	Casual Team Members	Union Team Members
Physician leaders will follow the same process for their Physician and Advanced Practice Provider direct reports as non-physician leaders.	The process is the same for all team members. If a team member has more than 2 positions, the leader(s) of positions 3 and higher will be notified about the process from the Employee Relations team.	First and second level reviews will have unique forms and are titled to designate the level. All forms are available in Talent Connect, regardless of FTE (Full Time Employee).	The process is the same all team members.

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2 Plan for the Review

Timeline

You can begin filling in comments as soon as the form opens on November 1. All reviews must be completed by February 28, 2025.

UNDERSTAND	PREPARE	DO	FOLLOW-THROUGH
November 1 Performance Review Forms Available in Talent Connect	**December 31** Suggested Self-Appraisal & 360 Feedback Request Deadlines	**February 1** Suggested check-in: Ensure that you are in a position to submit your Performance Reviews by the deadline	**February 28** Performance Review Deadline

Checklist: Expectations of Leaders

Now
- ___ Review support materials on ODandL.org
- ___ Explore Talent Connect
- ___ Review team list* and ensure accuracy & casual work requirements met
- ___ Break up your span of control over time
- ___ Determine a timeline for your team

November / December
- ___ Ensure each team member has goals in Talent Connect
- ___ Reach out to previous leaders
- ___ Begin filling out comments in forms (save without submitting)
- ___ Communicate expectations to team
  - Timeline
  - Optional 360 Feedback request
  - Optional self-appraisal

January / February
- ___ Fill out ratings and comments for each team member
- ___ Plan for known leaves
- ___ Forward forms in Talent Connect
- ___ Assign alternate reviewers as appropriate
- ___ Assign, review, and anonymize 360 Feedback requested by team member
- ___ Schedule and host 1:1 meetings with each team member

February 28
- ___ Complete all forms in Talent Connect

March
- ___ Set goals for 2025 with your team in Talent Connect

* Work with your HR Representative if you need to make changes to positions within your team

**An interactive technical user guide is coming soon!

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Communicating with My Team

Process Plan

Leaders should share the process they will use for performance reviews, including the team member's role, a description of each step of the process, and timing. This allows leaders to set expectations and invite team members into active participation in the performance review process.

There is an optional 1-page document for Team Members that you can distribute to your team members that can help you clarify the process for your team.

Sample Process Template

In your process document, you should explain the timeline for each step for your team. There is a blank form for you to fill out on the next page.

Step	Description	Sample Process	Due Date
360 Feedback	**Optional**: An opportunity to receive feedback from three or more of your peers and customers	Determine any parameters you will set for the process. **Example**: Must include 2 team members and 1 customer	12/31/24
Self-Appraisal	**Optional**: An opportunity for you to share your accomplishments for the past year	**Example**: Go into your Talent Connect home page and complete the self-appraisal, if desired	1/10/25
Performance Evaluations	**Required**: The 2023 annual performance review of daily work, performance to goals, and the Fairview Commitments.	Identify when you will begin writing reviews, when 1:1 conversations will be scheduled, and when you plan to be finished with the process. **Example**: Leader will begin writing performance reviews on 1/21/25. 1:1 Conversations will occur between 1/22 and 2/17.	2/17/25

There are several resources that you can use with your team:

- Team Performance Review Process Plan Template
- One-page summary for Team Members
- Coming soon! Team Member Resource Guide
- Coming soon! Team Member Interactive Technical User Guide
- Fairview Commitments

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Fairview Performance Review
Information for Team Members

Team Performance Review Process

The process that our team will use is outlined here.

Leader:

Step	Description	Our Team's Process	Due Date
360 Feedback	**Optional**: An opportunity to receive feedback from three or more of your peers and customers		
Self-Appraisal	**Optional**: An opportunity for you to share your accomplishments for the past year		
Performance Evaluations	**Required**: The 2024 annual performance review of daily work, performance to goals, and the Fairview Commitments.		

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Alternate Reviewer

Purpose and Philosophy

The Alternate Reviewer tool is available for leaders with more than 50 direct reports, those on leave, or in cases of recent internal transfers. This tool allows you to designate another people leader who has worked with the team member as an Alternate Reviewer.

The Alternate Reviewer will provide rankings and comments for team members. While the leader remains responsible for completing the review, this can be an invaluable tool if you have a large team, will be on leave, or if a previous leader has more insight due to an internal transfer.

Process

In Talent Connect, you'll send the form directly to the Alternate Reviewer, who will complete it and return it to you. Upon receiving it, you can review, edit, and adjust rankings. While you cannot change the Alternate Reviewer's comments, you can respond to them or add your own. You can proceed to the next step if you agree with their input.

1	**2**	**3**	**4**	**5**
NOTIFY ALTERNATE REVIEWER	**SEND TO ALTERNATE REVIEWER**	**ENTER COMMENTS & RATINGS**	**REVIEW & ADD TO COMMENTS & EDIT RATINGS**	**CONTINUE THE PERFORMANCE REVIEW PROCESS**
Invite the Alternate Reviewer & explain their role & deadline • Ensure Alternate Reviewer has resources for navigating Talent Connect	**Assign reviews to the Alternate Reviewer in Talent Connect** • Gather feedback from the Alternate Reviewer first	**Provide thoughtful feedback for the Team Member** • All comments will be visible to the team member • Rate the team member on their daily work, performance to goals, & Commitments • When finished, send the form back to the leader using Talent Connect	**Review, respond, add, and edit the form as needed** • Review comments from the alternate reviewer (you will not be able to edit); Respond or add to comments as desired • Review and edit, as needed, the suggested ratings	**Hold the 1:1 meeting & finalize the review form** • 1:1 meeting; leader provides feedback about successes & opportunities • Use both sets of comments as a learning opportunity for the team member • Send the form to the team member for acknowledgement
LEADER	**LEADER**	**ALTERNATE REVIEWER**	**LEADER**	**LEADER**

Key details about the Alternate Reviewer process:

- The Alternate Reviewer process is separate from 360 feedback and focuses on the collaborative completion of performance reviews.
- Team members will see feedback from both reviewers. If there are discrepancies, use it as an opportunity for discussion.
- Never share your personal login information. Instead, assign reviews to Alternate Reviewers directly through Talent Connect.

As the leader, you are ultimately responsible for completing the forms by the deadline.

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Alternate Reviewer

Planning & Communication

The Alternate Reviewer process is intended to be collaborative. Plan ahead and work with the reviewers that you've identified as early as possible.

Note that a charge nurse or lead is not considered a people leader but a peer in a specialized role. For nurse leaders, if you have a supervisor who is a people leader, you can assign performance reviews to them.

Be sure to reach out to your Alternate Reviewers early, allowing enough time for them to complete the form and return it to you. Discuss their role and the deadline, and ensure they have the resources to complete the review.

In Talent Connect, you'll send the form directly to the Alternate Reviewer, who will complete it and return it to you. Upon receiving it, you can review, edit, and adjust rankings. While you cannot change the Alternate Reviewer's comments, you can respond to them or add your own. You can proceed to the next step if you agree with their input.

The leader, Alternate Reviewer, and team member have different levels of access to the form at various stages, with the leader having the most visibility. Once you've reviewed the form, you'll continue the performance review process by holding a 1:1 meeting with the team member and finalizing the review.

360-Development Feedback

Purpose and Philosophy

Aligned with our Continuous Feedback philosophy, 360 feedback offers diverse perspectives, promoting engagement and development. 360 Feedback provides the team member additional information about their work from the perspective of their peers and customers. It contributes to our learning organization by providing employees with an opportunity for a wider array of feedback from multiple perspectives and drives employee engagement and development through a better understanding of strengths and opportunities.

360-Development Feedback is an employee-driven process that is available year-round to support development discussions during the annual review. Team members and their leaders select three or more colleagues or customers to provide written feedback on strengths and areas for growth, with key themes shared during the discussion.

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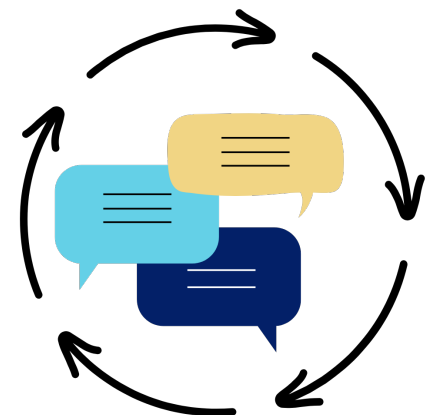
360 Development Feedback

360 Feedback is an opportunity to…	360 Feedback is NOT an opportunity to….
• Increase an employee's self-awareness through insights into their strengths, opportunities & performance	• Seek out feedback the leader can use to deliver difficult messages to their employee
• Provide a well-rounded view of employee performance & development through multiple perspectives	• Air grievances or judgements about an employee
• Discover new strengths & highlight existing ones	• Praise an employee's performance without any actionable feedback
• Discover new areas of opportunity & highlight existing ones	• Simply discredit or criticize an employee's performance without actionable feedback
• Help employees build self-awareness & new skills	• Create confusion or uncertainty
• Create a collaborative feedback culture	• Pit employees against each other

Important to know

Optional

✓ Not required
✓ Both leader & team member agree before proceeding

Collaborative

✓ Both leader & team member agree
✓ Collaboratively decide on feedback participants

Anonymous

✓ Feedback is an opportunity for growth
✓ Leader identifies themes to share

Non-punitive

✓ No impact or influence on merit increases
✓ No impact on performance review, ratings, or comments
✓ Can not be used for corrective action

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360-Development Feedback

Process

Both leaders and employees must agree to use 360-Development Feedback. It's optional and does not affect ratings or other parts of the review. There are no consequences if someone declines to use it.

1 CREATE FORM	2 NOMINATE FEEDBACK PARTICIPANTS	3 LEADER APPROVAL	4 GATHER FEEDBACK	5 FEEDBACK DISCUSSION
Create 360 Development Feedback form in Talent Connect • Talk to your teams to introduce the 360 process before sending out the form • Communicate due date expectations	**Choose colleagues who can comment on your strengths & opportunities** • Invite participants who will give you thoughtful, valuable feedback • Choose a minimum of 3 colleagues; leaders are encouraged to choose 5+	**Review & modify participant list** • Let your team members know if you make changes to the invited feedback participants	**Comment about the team member's strengths and opportunities** • Share feedback using the Fairview Commitments for support • Help your colleagues build awareness & new skills	**Find feedback in the 360 Detail Report** • 1:1 meeting; leader provides a well-rounded view of the team member's performance from multiple perspectives • 360 Feedback must be anonymized by leader
LEADER	**TEAM MEMBER**	**LEADER**	**FEEDBACK PARTICIPANTS**	**TEAM MEMBER & LEADER**

Requesting 360-Development Feedback

View the Technical User guide for instructions on how to complete the process in Talent Connect.

1. To get well-rounded feedback you'll need to select at least three feedback participants. We encourage leaders to select five or more.
2. Both the leader and employee should be engaged in selecting which individuals to seek feedback from.
3. Individuals should be chosen based on their knowledge of the employee's work. Examples might include a colleague they are working with on a project; a colleague who works closely with them on the same shift, an informal leader; etc.
4. Consider choosing individuals that will provide honest feedback around strengths and opportunities.

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Providing 360-Development Feedback

View the Technical User guide for instructions on how to complete the process in Talent Connect.

1. Using the Fairview Commitments, identify the top strengths and opportunities of the employee you're giving 360 feedback for (choose up to three strengths and three opportunities) based on your direct experience working with the employee.
2. Stick to providing feedback based on your experience and interactions with the employee. Avoid providing feedback from comments you've heard or assume about the individual.
3. Think about specific examples that you can share in the comments sections related to how the employee has demonstrated the Fairview commitment or has an opportunity to improve in demonstrating the commitment. For example:
    • Ahmed demonstrates creating an exceptional experience by providing excellent customer service. During the EPIC Implementation Project, he was always friendly and helpful, and provided the data we needed in a timely manner.
    • Michelle struggled to achieve results in the project improvement plan. Throughout the project Michelle demonstrated having a hard time managing her timeline and showed a lack of interest in meeting project deadlines.
    • Terry is great at setting and holding standards. When things get busy in the ED, they always remind us if we're deviating from the standard so we can pause and ensure we're providing the best care possible.
4. 360 Feedback will be used by the employee's direct leader to support a development conversation between the employee and leader.
5. Leaders will share themes from the 360 feedback and should be prepared to help employees process feedback related to Fairview commitments strengths and areas of opportunity.

Tips & Tricks for Meaningful Reviews

• We encourage you to start early as you plan for the review cycle. Spread out your work over time to avoid writing many reviews in a short period. Assign alternate reviewers and connect with previous leaders early, giving them enough time to complete their part so you can finalize the reviews by the deadline.

• Take full advantage of the available resources—writing templates, copy-and-paste spreadsheets, and communication materials to support your team and ensure a smooth process.

• To reflect on and include a summary of the entire year, remember to include kudos from earlier in the year, as well as performance related concerns, whether or not they have been resolved.

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3 Completing the Review

The Evaluation System
What is evaluated?

Daily Work	Performance to Goals	Fairview Commitments
✓ Essential job functions ✓ Skills, knowledge, abilities, & other characteristics needed for satisfactory performance of job description **33%**	✓ Performance & accomplishments related to Fairview's strategic priorities & performance dimensions ✓ Each team member needs to have at least one goal in the system **33%**	✓ Behaviors to achieve our mission & vision ✓ Consider how the team member demonstrates the guiding principles of our Commitments: Respect for People & Continuous Improvement **34%**

Additionally, an unrated section includes comments on the team member's progress toward their professional development goals.

Rating Scale Descriptions

Ratings	Characteristics	
5 Exceptional	✓ Efforts far exceed expectations ✓ Actively works to support others & organization	
4 Exceeds Expectations	✓ High quality of work ✓ Sustained effort regularly above expected levels ✓ Serves as a role model	
3 Meets Expectations	✓ Clearly meets expectations consistently ✓ Results are thorough & on-time ✓ Efforts toward achievement are consistent	Most Employees
2 Needs Improvement	✓ Inconsistent in meeting expectations ✓ Efforts are inconsistent or noticeably less than expected ✓ Not consistently meeting expectations	
1 Unsatisfactory	✓ Minimal efforts toward achievement & improvement ✓ Consistently below expectations ✓ Not meeting requirements	

Applying the Rating Scale to My Team

• When applying the rating scale to your team, it's important to establish clear, objective criteria before you begin. Consider measurable standards that define what each rating means for your team. Doing this in advance helps ensure consistency and reduces bias.

• These ratings will be a starting point for your performance conversations with team members.

Daily Work	Performance to Goals	Fairview Commitments
✓ Read the job description for the role ✓ Reflect on the team member's behaviors ✓ Apply the definitions to your observations of the team member's ability to apply & demonstrate their ability to perform their daily work	✓ Locate the team member's organizational goals in Talent Connect ✓ Read the organizational goals set for the team member ✓ Apply the definitions to your observations of the team member's performance to goals	✓ Review Fairview's 10 Commitments ✓ Reflect on the team member's behaviors ✓ Apply the definitions to your observation of the team member's ability to apply & demonstrate the 10 Commitments

Talent Connect

Our Performance Management Platform

Talent Connect is our software platform for managing performance and more. It serves as a portal for performance management, facilitates peer feedback through the 360 Development Feedback tool, and tracks individual and team goals.

Talent Connect offers three optional tools to enhance the performance review process: self-review, alternate reviewer (in specific situations), and 360 feedback.

Additionally, a writing assistant is available to help you craft written comments for your team members. For patient care teams, we've introduced a spreadsheet with customizable patient care comments that you can download and tailor to your team's needs.

You can find step by step instructions for completing tasks in Talent Connect in the interactive Leader User Guide. You will find written instructions at the end of this guide.

Modules within Talent Connect

Performance Management

360 Development Feedback

Goal-Setting

Professional Development

Succession Planning

Organizational Presence

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1:1 Meeting Tips

One of the most important parts of a performance review is the 1:1 meeting with your team member.

- During the meeting, focus on development, not just evaluation. Use specific examples and quantitative data to support your points and ensure any 360 feedback is anonymized.
- While you may have prepared extensively, use the 1 to 1 time to listen and create a dialogue.
- As you conclude, be clear about expectations and next steps for the team member.
- After the meeting, send the form to your team member for acknowledgment. All leaders must submit their 2024 review forms **by February 28, 2025**.

4   Follow-Through

Next Steps

Following through with a few critical steps after performance reviews ensures your efforts have lasting value and sets yourself up for a smoother review process in 2025.

First, reconnect with your team members in the coming weeks. Address any questions that may have come up and ensure they have the support and resources needed to succeed. Schedule regular check-ins to discuss progress on goals and development areas.

Second, set up systems to track and measure progress. One effective method is creating a spreadsheet with a tab for each team member, where you can add comments and observations throughout the year. These notes will be invaluable for ongoing performance discussions and make writing next year's reviews a breeze!

Lastly, celebrate successes and champion growth!

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Goal Setting

Another critical step is setting goals for 2025. There are two types of goals: organizational and individual.

Organizational Goals

The senior executive team sets organizational goals through Strategy Deployment. These goals cascade down through each leadership level, where leaders align their team's work with the broader objectives. Each team translates the goal into terms relevant to their work and cascades it further down to the front line.

Leaders and team members need to record goals in Talent Connect. Organizational goals, unlike individual goals, are visible across the organization. Every team member must have at least one goal, which leaders will assess in the following review cycle. If you have questions or would like more information about Strategy Deployment, contact OperationalExcellence@Fairview.org

Organizational Goal-Setting

Fairview establishes & share organizational goals through a process called **Strategy Deploymen**t. It is the responsibility of every leader to align their goals & the goals of their teams to the organizational goals.

Goals align to our Performance Dimensions
- Goals should be "Translated" to each level of the organization
- Goals & progress to goals are visible across the organization

All goals are recorded in the Talent Connect system
- Goals can be cascaded in Talent Connect
- Every team member must have a **minimum of one goal**
- Goals will be assessed in the 2023 Performance Review Cycle

For more information about Strategy Deployment, contact: **OperationalExcellence@fairview.org**

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Goal-Setting

Individual Development Goals

Team members set their individual goals in collaboration with their leader. These goals aren't visible across the organization and are unrated. Each team member should establish at least one goal focused on their professional development, which you'll discuss during your 1:1 meeting.

SMART Goals

SMART goals are Specific, Measurable, Achievable, Relevant, and Time-Bound. When we use the SMART acronym to create goals, we know we have a meaningful goal that can be measured. Using the SMART framework allows you to clarify your ideas, focus your efforts, and allocate your time in a way that promises the most return with the highest chance of achievement.

Please see the How to Guide – SMART goals at the OD&L website.

Customer Experience Goal Setting

Find information and resources to help you and your team create personal development goals that align to Connecting With Care.

Visit the Customer Experience Intranet page: Leader Resources: Supporting a Strong Culture of Customer Experience. Here you will find a Leader Discussion Guide that will walk you through the steps of creating a Connecting With Care SMART goal, including examples!

People Engagement Goal Setting

Find example SMART goals, actions, and resources for People Engagement goal setting.
Download the resource: Engagement Survey Example Goals and Actions. You'll find an overview of 2024 engagement survey results, explanation of each survey category, example People Engagement SMART goals, example actions, and recommended resources.

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5 Other
Resources & Support

Support
Contact your HR Representative

Technical Issues
Submit an IT Ticket through IT Hub

Guides & Resources
OD&L Performance Management Page & Resources

Guides & Resources for Team Members

- ✓ One-page Information for Team Members
- ✓ Coming soon! Resources for Team Members
- ✓ Coming soon! Interactive Technical User Guide: See It/ Try It / Read It options
  - Access Talent Connect
  - Complete a Self-Appraisal
  - Nominate 360 Participants
  - Complete 360 Feedback Forms
  - Create a Goal
  - Acknowledge Performance Review
- ✓ Fairview Commitments

Guides & Resources for Leaders

- ✓ One-page Quick Information for Leaders
- ✓ 25-minute overview video
- ✓ Resources for Leaders Guide (this document)
- ✓ Coming soon! Interactive Technical User Guide: See It/ Try It/ Read It options
  - Access Talent Connect
  - Completing a Self-Appraisal
  - The 360 Feedback Form
  - Sending a Review to an Alternate Reviewer
  - Completing a Review Form as an Alternate Reviewer
  - Completing a Review Form
  - Create and Cascade Goals
- ✓ Communication Resource for Team: Team Performance Review Process Template
- ✓ Self-paced course: Ongoing feedback
- ✓ Coming soon! Front-line health care comments for reviews
- ✓ Fairview Commitments

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Purpose

These frequently asked questions (FAQs) can help provide answers and guidance to team members regarding performance reviews, Talent Connect, and more. Click a link below to find answers to questions related to that topic.

Performance Review: General questions

Can leaders document coaching conversations and corrective action in Talent Connect?
The performance review should encompass all feedback, both positive and areas of opportunity. Prior to entering coaching or corrective action feedback, be certain you are connecting with your HR (Human Resource) Representative.

When are Performance Reviews due?
The deadline for 2024 reviews is February 28, 2025. There are **no extensions** for the 2024 Performance Year.

What is the cutoff date for team members who will not need a performance review for the performance year in question?
For the 2024 Performance Year, any team member hired October 1st or later will not need a performance review for 2023. The cutoff date may change year-to-year. Leaders should continue to have 30- and 90-day conversations with team members hired after October 1.

Are there different cutoff dates for different team member groups?
No, all forms are launched on the same date.

Should team members complete a self-evaluation?
A self-evaluation is encouraged but not required. The self-evaluation form is found in Talent Connect and is due by December 31, 2024.

Encourage your employees to go into the Talent Connect system and complete a self-evaluation. Find Self-Evaluation Information here.

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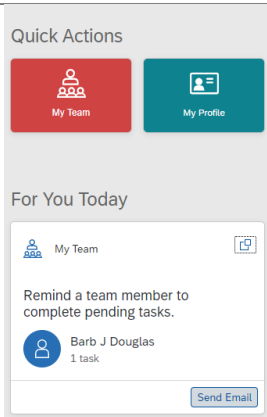
Should 360 Feedback be used as part of the Performance Review process?
The 360 Feedback process is built into Talent Connect and is an optional, collaborative process between the team member and their leader. For more information on the 360 Feedback process, see the 360 Philosophy and FAQs.

Will the leader get a final copy of the performance review once the team member acknowledges it?
Yes, completed reviews will be available in the leader and team member's *Completed* folder in Talent Connect.

What if I have many direct reports? Can others assist me with writing and conducting the performance conversation?

Yes. Talent Connect allows you to share the review process with an Alternate Reviewer. **This should only be done under the following circumstances:**

1. You have more than 50 team members
2. You expect to be on Leave of Absence (LOA) during the performance review cycle
3. You have a team member who transferred to your team, and you want feedback from their previous leader

You can find out more about the Alternate Review process here.

How do I know if I have tasks to complete in Talent Connect?
If you have tasks to complete, you will see a **To Do** tile on your home screen.
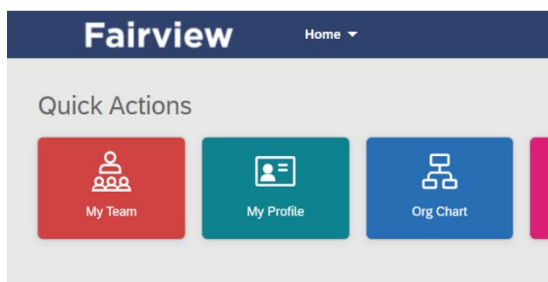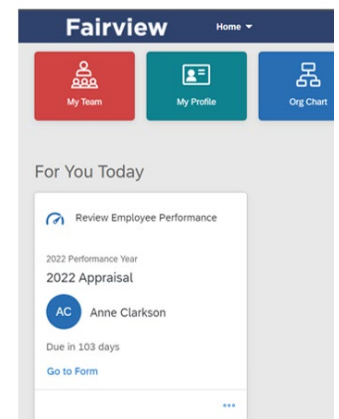
How will I know if my direct reports have tasks to complete?

The **Manage My Team** tile will indicate if you have direct reports that require attention.

How do I know which tasks my direct reports need to complete?
If you click into the list, you will see any tasks that need to be completed.

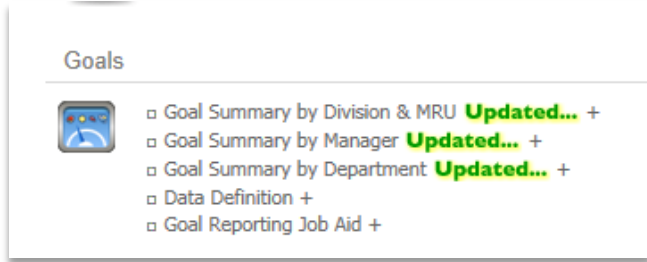**Is there a way to remind my team members they have tasks due?**
A leader will receive what is called a 'Nudge Card' when their direct report has overdue items in the 'For You Today' section. You will see this as a task on your homepage. This will send an email from Talent Connect to that team member using the template below. You can modify and cc yourself on this email.

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Is there a way to track completion for my team through Lawson?
Yes, there are reports available through Lawson Manager Self-Service in Workforce Metrics in the **Goals** section.

Goals

- Goal Summary by Division & MRU **Updated...** +
- Goal Summary by Manager **Updated...** +
- Goal Summary by Department **Updated...** +
- Data Definition +
- Goal Reporting Job Aid +

Team member Acknowledgement of Performance Review

When a leader signs off on the performance review, when does the team member get a copy?
Once the form is acknowledged by the team member, the form is considered complete and will be available in the leader and team member's **Completed folder** in Talent Connect.

Can leaders print a paper copy for team members to sign?
No, team members must acknowledge their performance review in Talent Connect.

Should I share the most up to date job description with the team member at the 1:1 performance conversation?
Yes, an important part of the process is the conversation between the manager and the team member to discuss the performance review content, job description and expectations. The team member will electronically acknowledge that they have reviewed the job description.

What if a team member is unable (ex. leave of absence) or refuses to acknowledge the review?

An important part of the process is the conversation between the manager and team member to discuss the performance review content, job description, and expectations. One step includes the electronic acknowledgement by the team member. If the team member is unable (ex. leave of absence) or refuses to complete this action, please make a note as to the circumstances and attach it to the team member's record in Talent Connect. The review will be left in acknowledgement status until it is automatically moved to completion on the designated due date.

Review for Team members Who Transfer Departments

- **Reviews for a team member who transferred to your department *mid-year*:**
  Since the review encompasses the entire performance year, reaching out to the previous leader to get feedback would be beneficial.

  Use the Alternate Reviewer feature to send a team member's review form through Talent Connect to their previous leader for feedback.

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- **Reviews for team members who transferred to your department at the *end of the year*:**
  - If the team member transferred toward the end of the performance review year, it is important to ask the previous leader to do a written assessment of the team member's performance prior to transferring to your team. You should use the Alternate Reviewer process in Talent Connect to gather this feedback. It may even be helpful for the previous leader to participate in the 1:1 performance conversation.

- **Reviews for team members who transfer in *January*:**
  - You do not need to write the review for the previous performance year if that team member did not work on your team during that time. However, you do need to help ensure that the review is completed. Collaborate with the team member's previous leader, who is responsible for completing the review.
    - Use the Alternate Reviewer process in Talent Connect to have the team member's previous leader complete the performance review. More information on the Alternate Reviewer process can be found here.
    - For the 1:1 conversation, the previous leader may conduct the meeting individually with the team member or both you and the previous leader can meet with the team member; or you can meet individually with the team member and share the previous leader's feedback.

Reviews and LOA

What if a team member is on a Leave of Absence (LOA)? When should I complete the review?
The review can be completed upon their return from leave. A suggested time limit is to have the review completed within the first 1-2 weeks upon the team member's return to work.

What if a manager is on a LOA? Is someone else able to complete the reviews?
Yes. You may use the Alternate Reviewer feature in Talent Connect. Reviews must be completed by another people leader. See pages 10 and 11 in this guide.

Goals
For general Goals FAQs, please see more information on the OD&L website.

Once goals are entered, how will leaders pull them into the Performance Review form?
Organizational goals will automatically populate in the Performance Review form. Once leaders begin Performance Reviews, goals that were previously added into Talent Connect will already be available. Leaders and Team members can also add new goals or edit goals in the performance review form.

How do you add goals in Talent Connect?
Please see Entering and Cascading Goals in Talent Connect.

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If team members update their progress to goals in Talent Connect throughout the year, will leaders be able to see it?
Yes. Leaders should have regular check-ins with their direct reports regarding their progress to organizational and development goals. Use the Comment box for each goal to record progress and conversations.

What is a Cascaded Goal?
A cascaded goal is the preferred method of creating a goal and assigning it to your team. Documentation on www.odandl.org in the Performance Management section has instructions for how to create a cascaded goal.

Pay
Please speak to your leader to ask specific questions regarding pay and watch for updates from your usual channels (ex. Leader News) for more information.

Ratings
Please see pages 15 and 16 in this guide for information about ratings.

My team member's final rating seems higher than I thought it would be. What happened?

The review is weighted, so Performance to Goals is 33%, Daily Work is 33%, and Commitments make up 34% of the overall rating.

Behind the scenes, Talent Connect calculates the overall rating based on how each goal and commitment category is rated. There is a rounding process in the formula that will occasionally round a team member's overall rating up. A leader must select a final rating for each team member. In most cases you will accept the system rating, but you have the latitude to select the rating you believe best represents your team member's performance.

Regulatory and Compliance

The performance review policy requires ongoing competency review for clinical staff. Is that included?
The annual performance review meets regulatory requirements for competency review.

Scope – Who is included?

How will Talent Connect be applicable to physician practices where the non-physician administrators manage the Lawson items but not the performance reviews? [OBJ]
Physician leaders will follow the same process for their Physician and Advanced Practice Provider direct reports as non-physician leaders.

Is the same form for step-in-grade team members? How about Union team members?
The process is the same for all team members.

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Is the same form used for casuals? What if it is their secondary (aka level 2) position?

First and second level (also known as primary and secondary) reviews will have unique forms and are titled to designate the level. All forms are available in Talent Connect, regardless of FTE (Full Time Employee).

If a team member has more than 2 positions, the leader(s) of positions 3 and higher will be notified about the process from the Team member Relations Team.

What is the cut off hire date for performance reviews in the current performance year?
Team members hired October 1st or later during the performance year in question will not require a performance review.

Talent Connect System

How is the Talent Connect website accessed?
Please see the [Performance Review User Guide](#).

Are Directors able to see their supervisor's direct reports reviews in Talent Connect?
No. Only the direct leader can see a team member's performance reviews, ratings, and comments.

Where do we find resources for words and phrases when writing a performance review?
The Writing Assistant in Talent Connect will help you with writing examples for each of the Fairview Commitments.

Am I required to provide written comments?
No. Comments are not required but are encouraged. Your team member has contributed for a year and deserves feedback on their strengths and opportunities.

Can edits be made after the 1:1 conversation and before the team member acknowledges?
Yes, the entire performance review document is editable by the leader until the leader clicks **Confirm 1:1 Meeting** and the review moves to the Team member Acknowledgement step.

Can leaders print a copy of the performance review?
Leaders can print (or create a pdf copy of) a review at any time in the process by clicking on the print icon in the upper right-hand corner of Talent Connect.

Why am I getting a nudge to complete something when I am done with everything?
Leaders who have direct reports who are also leaders, will get a nudge when that leader has items left to do.

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Other

Will leaders be asked to document all 1:1 meetings with team members in Talent Connect?
Leaders must click a button acknowledging they completed a 1:1 discussion about the performance review with each team member.

Is 360 Feedback going to be expected or a tool suggested for use during the FPR process?
A 360 Feedback process is integrated directly into Talent Connect. It is an optional, collaborative process between the team member and the leader. More information on the 360 Process can be found here.

How are reviews written for float pool staff that work with multiple leaders?
The primary leader assigned in Lawson should write the review and collaborate with other leaders to gather feedback.

What is the best web browser to use to see the icons in Talent Connect?
Answer: Chrome.

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