Fairview Performance Review Cycle

Checklist For New Leaders

Helping you achieve success with your first Performance Review.

Understanding the Performance Review Cycle

Performance Reviews are an important process at Fairview because it not only helps our employees grow in their careers, but it also 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.

> **"Leadership and learning are indispensable to one another."**
> – John F. Kennedy, Jr.

Our Performance Management 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.

Our Performance Review Process

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.

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	**Evaluate the Performance of Your Team for the year**	**OPTIONAL: Collaboratively Calibrate Teams**	**Share feedback about team members' strengths and opportunities**	**Team Member acknowledges their copy of the review**
• 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	• Add ratings and comments to the review form • Collaborate with an Alternate Reviewer in limited circumstances	• Leader takes one final review before moving to the 1:1	• Discuss Potential Successors with Your 1-Up Leader • If you identify changes to make to the review form, DO IT NOW.	• The review form is complete • No changes can be made to the form at this stage •
TEAM MEMBER	**LEADER**	**LEADER**	**LEADER**	**TEAM MEMBER**

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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 hired before October 1, 2023 ✓ Celebrate success & identify opportunities for growth	✓ Daily work (33%) ✓ Performance to goals (33%) ✓ Fairview Commitments (34%)	✓ Due March 1, 2024 ✓ No extensions

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

Self-Evaluation	✓ 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, 2023
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: ✓ Leave of Absence ✓ More than 50 direct reports ✓ Needs feedback from a previous leader for internal transfers

Top 10 Things to Know

1. The 2023 Performance Review form is open from November 6, 2023, until March 1, 2024, when all Performance Reviews MUST be completed.
2. Self-evaluations should be completed by December 31, 2023.
3. Everything related to Performance Reviews are completed in Talent Connect.
4. You must complete performance reviews for each team member you manage and meet with them 1-on-1 to go over feedback.
5. Leaders with high spans of control can designate an evaluator to help provide feedback for team members, especially if you are new to leading your team.
6. Tools are available to help you at odandl.org/performance-management/.
7. Talk to your team about setting SMART goals.
8. Learn how to enter and cascade goals in Talent Connect.
9. Get to know the Performance Management Rating system.
10. Get started early and set short-term deadlines for yourself. It seems like a long time, but March 1 will be here before we know it. Use the Tips for Meaningful Reviews document for some helpful tips.

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Navigating Performance Review Resources

I am new to this!
How do I use the resources provided to understand the process and expectations?

It can feel overwhelming when the Performance Review cycle is new to you. Not only is the process new, but when you log in to see the resources, you find so many that you might not know where to start. That's ok! Those resources are there to help you at every step along the path. This document can help you find the resources you need to understand the process and get started!

General Overview to Understand Process	Completed
Watch the Performance Management Overview for New Leaders Webinar Recording	☐
Read the Annual Performance Review Process Guide	☐
Read Tips for Meaningful Reviews	☐
Read FAQs for Leaders	☐
Review Alternate Reviewer Process Guide	☐
Review Self-Evaluation Process Guide	☐
Review 360 Feedback Philosophy, Expectations, & FAQs Document	☐
Planning and Preparation	
Read and complete Team Performance Review Process Template	☐
Review Fairview Commitments	☐
Review Rating Scale Descriptions	☐
Review the "Ongoing Feedback" self-directed, 10-minute course in preparation for providing positive and constructive feedback at your 1:1 meeting with your team members as part of the Performance Review process.	☐
Review the SMART Goal Leader Discussion Guide as you prepare to help your team members develop strong goals using the SMART method.	☐

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Getting Started	
Review the Performance Review User Guide, an interactive guide showing screen-by-screen instructions to complete the performance review in Talent Connect, including the self-evaluation and alternate review process.	☐
Review the 360 Development Feedback User Guide, an interactive guide showing screen-by-screen instructions to complete a 360 Review in Talent Connect.	☐
Review the Entering and Cascading Goals in Talent Connect Process Guide.	☐

If you need help:

Reach out to your HR Representative

Your HR Representative can provide answers and support about the process and any areas where you experience challenges. Reach out to them directly with questions or concerns.

Connect with OD&L

Organizational Development and Learning has put together the resources to help you be successful. If you have questions or comments, please feel free to reach out to OD&L at odl@fairview.org.

The Performance Review FAQ Lookup Tool may also help answer your questions. Thank you in advance for your time and support in this important work.

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Additional Learning Opportunities

Develop your leadership skills with these self-paced, on-demand learning courses.

To access each module, click on the links below. If you would like a record of you taking a module, you can take them in our Learning Management System.

Leadership

Employee Recognition

- Benefits of recognition
- Factors that influence effectiveness
- Differences between formal & informal recognition

Take Employee Recognition Course

Diversity, Equity, & Inclusion

Communication Across Cultures: Clarity

- Learn "Global English" strategies
- Assist listeners while respecting language limitations
- Explore triangulation of messaging

Take Communication Across Cultures Course

Leadership

Coaching Skills

- Fast track your coaching effectiveness
- Increase motivation, improve performance, relationships, and team engagement

Take Coaching Skills Course

Communication

Active Listening

- Differences between passive and active listening
- Steps you can take to become a more active listener

Take Active Listening Course

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