

# Performance and Talent Working Group Meeting Minutes

Date: Tuesday, September 15, 2020  
Time: 1:00 pm

WebEx

## 1. Welcome & Roll Call

Name		Name		Name	
Scott Bauer (TAMU)	X	Brandy Kosh (TAMU)	X	Bridgett Chargois (TAMU)	X
Gari Jones (AL-EXT)	X	Elvia Olivia (TTI)	X	Toni Nerren (TAMUCC)	X
Charlotte Banks (TAMUT)	X	Patricia Morgan (TAMUSA)	X	Tina Flores-Nevarez (TAMUCT)	X
Tammi Thompson (TAMUC)	X	Trudy Hanson (WTAMU)	X	Joni Foster (TAMUSA)	X
Kami Xiong (WDS)	X	James Ross (WDS)	X		
Jan Aspelund (Guest)	X	Carmen Garcia (Guest)	X	Joy Bading (Guest)	X
Kimberly (Guest)	X	Nancy DeLeon (Guest)	X		

## 2. Action Item Review

- a. Update the Get Additional Manager Review Business Process security policy to add Talent Partner and Talent Partner View Only Roles to the “view all” rights for this business process. Held until October HCM meeting.
  - i.
- b. Update and Discussion on the agenda - Look at granular security to allow the employee to see the status, but not the review information as it is changing.
- c. Presenting and voting on the new sequence is on the agenda - Move forward with the updated sequence of the Get Additional Manager and Reviewer steps for presentation at the next meeting.
- d. Presenting and Discussion back on the agenda - Performance Review Business Process and Questionnaire
  - i. James will move forward with testing and demo the Performance review questionnaire as an add-on to the business process.
  - ii. Research the advancing of the manager’s task without waiting for the completion of the self-evaluation.
  - iii. Can the Business Process sequence have all the additional steps come without having them wait on the self-evaluation complete first?

- iv. Look at the notifications on the completion of self-evaluation step, what does a manager get?
- e. Demo and Discussion on Agenda - Performance Review Templates
  - i. Look at the verbiage of Manager/Employee Review Meeting section, to include question content and instructions.
  - ii. James will continue to test and develop the validation option allowing companies to opt out of the get additional manager/reviewer.
  - iii. Review the titles of the Performance Review Templates.
  - iv. Review the sequence of sections on the review?
- f. Discussion is on the agenda - James to do the security testing and working group members will discuss with those they represent these security changes for their feedback to be voted on at the next meeting.
  - i. Give the Talent Partner the ability to manually send back a review to help with manager change issues.
  - ii. The ability to cancel or rescind the tasks of get additional managers/reviewers (currently only Talent Admin has access)
- g. Discussion is on the agenda - James to bring the updated instructional text to the next meeting for a vote.

### 3. New Items

- a. Reporting and Dashboard Discussion: Kami Xiong presented recent changes that have been implemented for the talent and performance reports. Including adjusting the security on several reports. Kami reviewed the some of the goal reports that are under development at the moment and expected completion time frames.
- b. Discussion and Comment Merit Partner access: The working group reviewed the request for Merit Partners to be giving security access to run the performance report to get the overall ratings for employees. To give Merit Partner the ability to run the reports themselves and get the data they need they will need access to the following domains:
  - a. Worker Data: Performance Reviews (Merit partner **constrained** already exists)
  - b. Worker Data: Employee Reviews

This will open up access to all the completed reviews on employee profiles to the Merit Partners. The group was in consensus that they do not want Merit Partners to have full access to the complete review content. Several Working Group Members say they can see the overall rating on one of the Merit Reports. James is going to review again with Sri about the need and the report that they say currently has the rating on it.

- c. Discuss and Vote on the Updated Help text for Get additional Manager Evaluation step: The instructions on the Get Additional Manager Step do not make it clear that they are limited to adding only two additional managers. The group reviewed to old text of “You can select one or more people to serve as an Additional Manager.” And agreed to update the text to “You can select up to two people to provide an Additional Manager Evaluation.”
  - a. Vote: This a vote to recommend updating the help text to the proposed text change of “You can select up to two people to provide an Additional Manager Evaluation.”
    - i. Yes is to move forward with the change 10/12
    - ii. No is to not make the change 0/12
    - iii. Did not vote 2/12
  - b. Passed James will submit a change to update the Text
- d. Discuss, Demo and Vote: Talent Partner Security: At the last meeting we reviewed the option to update the security on Talent Partner on a couple of different business processes.
  - a. Talent Partner ability to send back a performance review: we discussed that the Talent Partner would have the ability to send the review back to a previous step in the process. This would include the option to send a review from a completed status back into in progress. It was emphasized that they should have in place a good structure of policy and practice when they are going to send a review back in progress from a completed state. This change also puts in the Talent Partners hands the ability to correct when a manager changes in the middle of the review process.
    - i. Vote: Vote is to recommend providing the Talent Partner security access on the Start performance review (annual and ad hoc) BP to send a performance review back to a previous step.
      - 1. Yes is to move forward with the recommendation. 10/12
      - 2. No is to not make the change to the security for the talent partners. 0/12
      - 3. No Answer 2/12
    - ii. Passes James will take the next steps to get it into place
  - b. Talent Partner cancel or rescind Additional Manager / Reviewer tasks that have been assigned to other Managers / Reviewers. During testing it was discovered that the Talent Partner roles does not have that access to see the worker history in the overview tab of the worker profile, those with additional HR roles are able to see

- it due to those additional roles, the experience would be different for different talent partners, so at this time I am going to table this change for further testing.
- c. It was brought up in this meeting to also provide the Talent partner the ability to advance a performance review, when the needs arises. Working group members will discuss this topic with those they represent and we will vote on this change at the next meeting.
  - e. Discussion and Vote: Re-Sequence additional Manager and Reviewer: at the last meeting we reviewed the business process and determined that a change in the sequence of the steps should be done. We are recommending that the Get Additional Reviewers be moved to first step for the manager. We should consider this one to be first because the Reviewer is only able to provide ratings and comments on the competencies section. They are not able to see the self-evaluation content so there is no impact with it going first. While it is important to have the self-evaluation content on the Additional Manager Reviewer
    - a. Vote: Voting to recommend a change in the sequence of the Start Performance Review (annual and ad hoc) BP. Where “Get Additional Reviewers” is now step b and launches first to the manager and “Get Additional Manager Evaluation” is now step b1 and launches after the self-evaluation and Get Additional Reviewer steps are submitted.
      - i. Yes – is a vote to make this recommendation of change.  
9/12
      - ii. No – is a vote to not make this recommendation of change.  
0/12
      - iii. No Answer 3/12
    - b. Passes James will take this change to the HCM Advisory Council.
  - f. Discussion and Demo: Conditional Rules have been added to the Get additional Manager Evaluation and Get Additional Reviewers steps. The group discussed the impact of adding a conditional rule into the Get additional Manager Evaluation and Get Additional Reviewers steps. The condition rule will be added and all system members will be on the list to start with, this keeps the current experience the same for everyone and then System Members can contact Workday Services to Opt Out of either or both of the Get additional Manager Evaluation and Get Additional Reviewers steps. When you opt out your managers will no longer receive either or both of the Get Additional Manager Evaluation and Get Additional Reviewers steps.

The vote was going to be held at the next meeting but since we discussed this for two meetings now the group was ready to move forward recommending this change.

- a. This a vote to send a recommendation to add the condition rule to the get additional manager evaluation and get additional reviewer steps that allows the system member to choose to opt out of those steps.
  - i. yes 9/12
  - ii. no 0/12
  - iii. No Answer 3/12
- b. Vote Passes will move this forward as a recommendation to the Advisory Council.
- g. Discussion and Demo: We will look at adding a questionnaire to the process that could be opted in: During the changes and testing for other topic, the questionnaire did not function properly. Will postpone to next meeting.
- h. Discussion: Review of notifications that are part of the review process. We discussed and looked at the notifications that go out for each of the performance review business processes. At the moment the only notification that go out are the system alerts and when a review is cancelled or rescinded. The group talked about adding some time delayed notifications as reminders to complete a task. James will review the options and present suggestions at the next meeting.
- i. Discussion: Review of the Template titles- The group reviewed the current template titles with the V2 on the end which is the version or iteration of that template. Some believe that it led to some confusion. The group agreed we should update the naming convention to and the FY to the end. We will vote on this recommended change at the next meeting.
- j. Discuss and Demo the New Guided Experience for the performance review template. The group liked the look and the feel of the new template and the group seem to recommend moving in this direction. Some of the members mentioned they liked having the option to use just the summary editor, using the new guided experience template does not allow them to choose. Discussed that the new template at this time does not have the ability to bring in the responsibilities off of the position description at this time. Did not seem to be a deal breaker. James will test adding a questionnaire section to the review template to point the employee and manager to review the position description and leave comments on the review. The responsibilities section should be available by the end of 2021. James will bring an alternative for the responsibilities section and a vote to the next meeting.

- k. Additional Change suggestions
    - a. Discussion: Trigger all the Additional Manager and Reviewer steps at once: A suggestion had been made to trigger the Employee Self Evaluation, Get Additional Reviewers, and Get Additional Manager evaluations at the same time. This was tested and can be successfully done. However this created a lot of tasks in the inbox for the managers and additional managers did not have the data on the templates from the self-evaluation, and did not seem to be a good user experience. James recommended not moving forward with this suggestions.
    - b. Step Label Overrides: James is presenting the option to take up the step label overrides for the majority of the steps in the performance review process. This will create a much better experience for the end users when looking at their inbox with descriptive task names instead of the review template name. For example “Annual: Staff Performance Review (Self Evaluation) V2: James Ross” Could be changed to say “Performance Review – Get Additional Reviewers for: James Ross”. The group thought this was a great change. James will bring it to vote for recommended change at the next meeting and a list of labels to change.
    - c. Optional Additional Reviewer Manager task: Since we are not able to provide the Talent Partners the security to cancel reviews that were sent to additional reviewers or additional managers. James provide the option to change the tasks that the additional reviewers or additional managers received to be optional which means they can use the skip this task feature to remove it from their inbox if are not going to complete it or was sent to them in error. The group agreed this would be a good change and James will bring it to the group for a vote at the next meeting.
    - d. Position Restrictions Update: James asked the group how many of the system members have their managers actually update their positions restrictions after a review cycle. Vast majority said no. Most had their HR departments complete this task. James made a suggestion to remove the To Do requesting the Managers to update their position restrictions or to consider reassigning it to a talent or HR security role. Then group agreed we should consider reassigning it. James will talk to the HCM Lead DeAnna White about assigning a HR role to this task.
4. Questions/Comments
- a. None

### 5. Next Steps

- a. James will talk to the HCM Lead DeAnna White about assigning a HR role to this task
- b. James will bring the option to make the tasks additional manager and reviewers get optional to the group for a vote at the next meeting.
- c. James will bring it to vote for recommended change at the next meeting and a list of labels to change.
- d. James will bring an alternative for the responsibilities section and a vote to the next meeting.
- e. James will test adding a questionnaire section to the review template to point the employee and manager to review the position description and leave comments on the review.
- f. We will vote on this recommended change to use the FY in the Template Titles at the next meeting.
- g. James will review the notification options and present suggestions at the next meeting.
- h. James will start the change process for adding conditional rules to the Get Additional Manager Evaluation and Get Additional Reviewers Step and send the recommended change to the HCM Advisory council in October.
- i. James will start the change process to the sequence of the Start Performance Review (annual and ad hoc) BP. Where “Get Additional Reviewers” is now step b and launches first to the manager and “Get Additional Manager Evaluation” is now step b1 and launches after the self-evaluation and Get Additional Reviewer steps are submitted. This is for the October meeting.
- j. Working group members will discuss the ability to manually advance a performance review by a talent partner with those they represent and will be voted on at the next meeting.
- k. James will start the change process and send it to the HCM Advisory board to provide the Talent Partner security access on the Start performance review BP to send a performance review back to a previous step. This is for the October meeting
- l. James will start the change process update the help text to the proposed text change of “You can select up to two people to provide an Additional Manager Evaluation.” on the get additional reviewer task.
- m. James is going to review again with Sri about the Merit Partner need and the report that the working group say currently has the rating on it.

Next Meeting: September 30, 2020 at 1:00pm