



Talent & Performance Working Group

Date: 6/8/2023

Meeting Time: 3:00 PM

Working Group Members

Name		Name		Name		Name	
Scott Bauer	X	Cassandra Casanova	X				
Joni Foster	X	Becky McNair	X				
Alicia Michalak	X	Erica Wallingford	X				
Rebekah Purget	X	Kristi Schramm	X				
Jody Ramirez	X						
Patricia Williams	X						

1. Review Open Action Items

- Initial and Ad Hoc reviews- competency change complete *(for those who requested)*
 - Some members noticed when completing annual performance reviews they were able to see a ‘History’ within the goals section and were able to see the initial review for the employee (Will be researched further)
- Prior year performance review templates (2021 date in title) have been inactivated
- Succession planning
 - Will be sending out poll soon for date to demo

2. Discussion:

- Performance Review “due dates”
 - Based on time frame from launch date not a specified calendar date
 - Some members send out custom deadlines so employees ignore them
 - Other members have had issues with employees submitting early to hit due dates
 - All members that responded voted in favor of removing due dates
- Reassignment requests- Security Partners can approve
 - Question about the ability to open up the options for ability to reassign performance reviews to other employees or managers
 - Manager that is assigned to performance review can delegate task to other employees
 - Some members have had performance reviews populate in wrong managers inbox and have to have that manager delegate to correct manager

- Some cases of reassign not working (will be researched)
 - Amy will look into Workday brainstorm for a change to functionality
- Annual Performance Review copying and renaming practice
 - Cannot relaunch same performance review with same name if there is still an open one from previous years
- I propose we end this practice
 - incomplete reviews can be mass canceled
 - Old performance reviews would need to be cancelled to reuse each year instead of copying (This can be done with mass action)
 - Some worry about PRs sitting on a final acknowledgment and being cancelled before employees have a chance
 - PR data is saved even if it is cancelled (Will need to research where the cancelled reviews are visible from and how to make them more accessible to managers)
- What questions or concerns do you have?
 - Integrations team has been notified of request to change for initial PRs not be triggered upon transfer (Will follow up on progress)
 - Member noticed upward of 4,000 manage goal items dating years back due to back and forth nature of Workday goals process
 - Discuss eliminating step or replace with notification or to-do
 - Some members agree removing employee acknowledgement step, none voiced in favor of keeping it

3. Next Steps and Action Items

All: Email questions or concerns regarding the review renaming practice so we can research them.

All: Next meeting August 10, 2023