Conducting Virtual Performance Reviews

Fiscal Year 2020
Welcome & Introductions

- David Smithwick, Assistant Vice President, Human Resources Compensation
Moderator

• Abby Farrell, Senior Practice Partner, Learning & Organization Development
Interactive Tools - Chat

1. **Chat.** Make sure that your “Send To” is set to **All Participants.**

If you’re asking a question relative to the discussion, the moderator will capture the question for response during the Q & A Session.

If you have a general question (Ex: troubleshooting issues), you will receive feedback via the chat.
What has changed? 😊
What Should Stay The Same? Performance Evaluation & Planning Discussions

• Important to continue performance and planning discussions despite changing workplace dynamics
• Utilize your current framework and/or form
• Best practice to maintain ongoing dialogue that includes feedback and coaching throughout the year (goals, updates, professional development)
Changing Dynamics of Work

Pandemic Profile

• Each weekday about 14,000 off-campus users connect to Duke
Agenda:

1. Tools for Virtual Performance Reviews
2. Scheduling Reviews
3. Review Process
4. 7 Tips for Successful Virtual Performance Reviews
5. Questions/Answers
Virtual Tools: video conferencing

- Zoom
- Cisco WebEx
- Microsoft Teams: use “video” icon in chat feature
Collaboration

**Microsoft Teams** – Teams is a team collaboration application that is fully integrated with Microsoft Office 365 and helps your teams work more quickly and efficiently. Microsoft Teams is automatically available to all Duke Office 365 Email and Calendar users. [Get Started] [How To Videos]

**WebEx** – WebEx is a suite of online meeting tools that allow you to meet with participants inside and outside of Duke using your computer and/or telephone. All Duke Health and Duke University faculty, staff, and students may host and run meetings using Duke’s WebEx service. Recording of Protected Health Information (PHI) is not permitted in Duke Health's WebEx. [Get Started]

**Zoom** – Use Zoom to meet using video, voice, and screen sharing with colleagues across the campus or around the world. With Zoom, up to 300 participants can attend via phone, computer, mobile device, or video conferencing endpoint. [Get Started] [Recommended Settings] [How To Videos] [Steps to Secure Your Zoom Sessions]

Zoom is available automatically for Duke University campus-based faculty, staff, and students. Duke Health may use Zoom for classes and meetings but NOT for clinical purposes to see patients or exchange PHI. Any meeting with the possibility of PHI may not be recorded. According to Duke’s terms of service, sensitive information may be discussed during a live Zoom meeting when recording is not in use but should not be recorded, typed into a chat session or otherwise stored within Zoom.
Virtual Tools: audio conferencing

• Telephone: simple phone call

• Cisco Jabber: call using office phone number

• Microsoft Teams: call using “phone” in chat feature
Communication (voice, fax)

Jabber – Use Jabber to connect with colleagues individually or in a group to cut down on the amount of email in your inbox. You can also answer your work phone using Jabber.

Collaboration

Microsoft Teams – Teams is a team collaboration application that is fully integrated with Microsoft Office 365 and helps your teams work more quickly and efficiently. Microsoft Teams is automatically available to all Duke Office 365 Email and Calendar users. [Get Started] [How To Videos]

keepworking.duke.edu/tools

- Download applications
- Find support resources
Set a date and time

• Review department/school dates and expectations for submission of performance ratings

• Schedule a mutually agreeable date and time for the performance review and planning discussion

• Agree on the meeting format and discuss any needs for technical support requirements for virtual meeting
Performance Review Process

Conducting Virtual Performance Reviews
Self-Assessment

• Valuable tool for generating dialogue (achievements, goals, performance, professional development)

• Request when scheduling time for performance review
PEP (Performance Evaluation & Planning) Form

Section 1: Evaluation of past year

- Role and Responsibilities (job description)
- Individual Goals
- Behaviors (based on Duke Values)
- Overall Evaluation
PEP (Performance Evaluation & Planning) Form

Section 2: Plan for the Coming Year

• Goals for the Coming Year
  • Development Plan
7 Tips for Successful Virtual Performance Reviews

Conducting Virtual Performance Reviews
7 Tips for Successful Virtual Performance Reviews

1. Focus on the full year of job performance, not just recent events that required adjustments. Otherwise, you may end up with some rating inflation based on more emphasis on the last two months of making adjustments for different work schedules and/or location.
7 Tips for Successful Virtual Performance Reviews

2. Performance ratings are one element for determining eligibility for lump sum payments.
3. Pay close attention to expressions and body language when using video tools (yours and your staff member’s).

*55% of all communication is body language.
4. Listen carefully. Being an active listener cultivates trust. Having some silence to allow time for responses or assimilating thoughts is good.
5. Strike a balance between how to clearly get your message across and understanding how it will be best received. Be open to modifying your perspective.
7 Tips for Successful Virtual Performance Reviews

6. Be understanding. You may not know what a staff member has experienced as a result of the COVID-19 pandemic.
7. Always solicit feedback (this process is new for many supervisors, too). How can I best support you in the weeks/months ahead? What worked, what could be better for this and future discussions?
Warning: Recording of Performance Reviews

- Performance reviews are not to be recorded without the written, advance permission of both parties. Recordings must be provided to both parties at the end of the review session.
Questions?

Conducting Virtual Performance Reviews
Conducting Virtual Performance Reviews

Thank you for participating!