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DEPARTMENT OF ADMINISTRATIVE SERVICES
CHIEF HUMAN RESOURCES OFFICE

The Performance Accountability and Feedback checklist is consistent with State HR Policy 50.035.01 and applicable collective bargaining agreements. Managers will be conducting the quarterly check-ins in-lieu of the yearly performance evaluations.

For additional resources, tools, and job aids to help you through this process, visit https://www.oregon.gov/das/HR/Pages/PAF.aspx.

SECTION 1 | NEW AGENCY HEADS INITIAL TRAINING AND TASKS

All new agency heads are required to conduct quarterly check-ins with employees who are not executive service and will need to complete the following tasks. Each task identifies the timeframe for completion. All tasks need to be completed prior to conducting their first check-ins with employees.

TASK	TIMEFRAME
1. Complete Module 1 | Self-Paced Online Course (30 minutes) Overview of Performance Accountability & Feedback	Within 30 days of position start date
2. Complete Module 2 | Self-Paced Online Course (30 minutes) Planning Phase online course	Within 30 days of position start date
3. Complete Module 3 | Self-Paced Online Course (30 minutes) Monitoring & Quarterly Performance Feedback Phase online course.	Within 30 days of position start date
4. *Review existing performance expectations and goals for each employee and document the yearly performance expectations and goals in Workday.	During the first quarter of position start date
5. Meet with each employee to discuss yearly performance expectations and goals.	During the first quarter of position start date

*The manager can run the Workday report called 'HCM Check-ins Overall'. This report will show all the check-ins that were completed previously.

SECTION 2 | NEW (SUPERVISORY) MANAGERS INITIAL TRAINING AND TASKS

All new supervisory managers are required to conduct quarterly check-ins with their employees and will need to complete the following tasks. Each task identifies the timeframe for completion. All tasks need to be completed prior to conducting their first check-ins with employees.

TASK	TIMEFRAME
1. Enroll into the Foundational Training Program The training will be assigned to new managers. They must enroll into a cohort in Workday within five (5) days of position start date and complete the training within four (4) months.	Within 4 months of position start date
2. Complete Module 1 | Self-Paced Online Course (30 minutes) Overview of Performance Accountability & Feedback	Within 30 days of position start date
3. Complete Module 2 | Self-Paced Online Course (30 minutes) Planning Phase online course	Within 30 days of position start date
4. Complete Module 3 | Self-Paced Online Course (30 minutes) Monitoring & Quarterly Performance Feedback Phase online course.	Within 30 days of position start date
5. *Review existing performance expectations and goals for each employee and document the yearly performance expectations and goals in Workday.	During the first quarter of position start date
6. Meet with each employee to discuss yearly performance expectations and goals.	During the first quarter of position start date

*The manager can run the Workday report called 'HCM Check-ins Overall'. This report will show all the check-ins that were completed previously.

SECTION 3 | 12-MONTH FEEDBACK CYCLE FOR NEW SUPERVISORY MANAGERS

New supervisory managers begin their 12-month cycle the quarter after completing all the required training and yearly planning identified in the initial training and tasks section.

The new supervisory manager's start date determines the 12-month feedback cycle. Use the table below to determine the initial quarter and then the 12-month feedback cycle.

Manager's Position Start Date *If the manager's position start date is between…*	**Set Initial Performance Expectations & Goals** *The manager will identify the performance expectations and goals, meet with the employee, and document them in a check-in by….*	**Initial Observation Begins** *The manager will monitor and observe employee performance during these months for their initial quarter.*	**Conduct & Document Initial Check-in Meeting By** *The manager to hold initial check-in meeting to discuss the employee's performance and document the check-in by……*
October 1 – December 31	End of March	April – June	End of July
January 1 – March 31	End of June	July – September	End of October
April 1 – June 30	End of September	October – December	End of January
July 1 – September 31	End of December	January – March	End of April

SECTION 4 | 12-MONTH FEEDBACK CYCLE FOR NEW EMPLOYEES

When a new employee is hired, the 12-month feedback cycle will be based on the employee's position start date. The manager will establish initial performance expectations and goals and meet with the employee to discuss them in the quarter the employee was hired.

Employee Position Start Date *If the employees position start date is between…*	**Set Initial Performance Expectations & Goals** *The manager will identify the performance expectations and goals, meet with the employee, and document them in a check-in by….*	**Initial Observation Begins** *The manager will monitor and observe employee performance during these months for their initial quarter.*	**Conduct & Document Initial Check-in Meeting By** *The manager to hold initial check-in meeting to discuss the employee's performance and document the check-in by……*
October 1 – December 31	End of December	January – March	End of April
January 1 – March 31	End of March	April – June	End of July
April 1 – June 30	End of June	July – September	End of October
July 1 – September 31	End of September	October – December	End of January

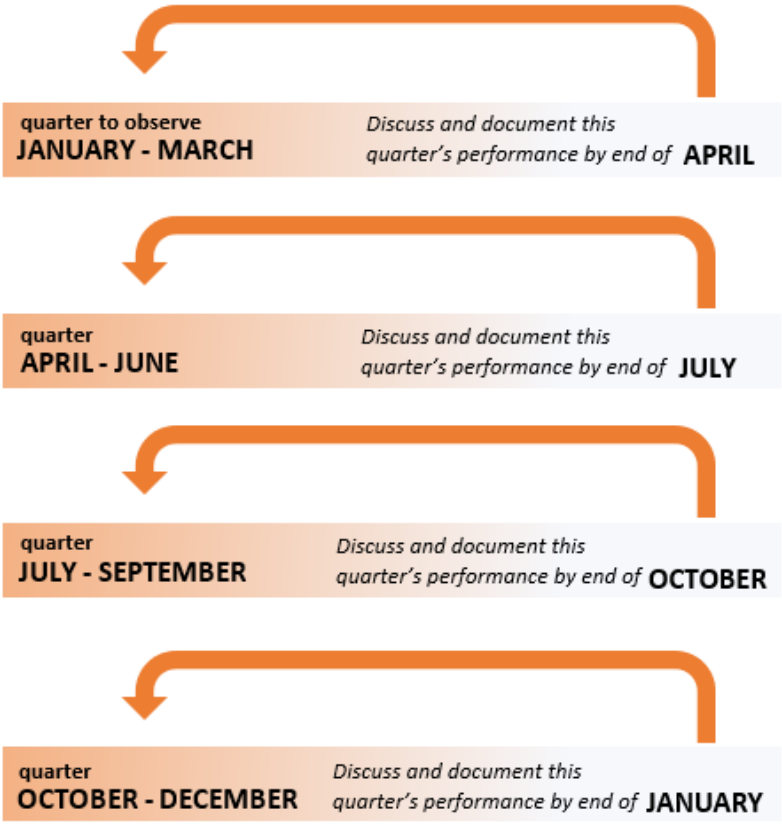
SECTION 5 | 12-MONTH FEEDBACK CYCLE | OBSERVE, DISCUSS AND DOCUMENT

This section covers the minimum requirements managers need to do over a 12-month feedback cycle. Use this checklist to make sure you complete all the steps. For additional resources, tools, and job aids to help you through this process visit https://www.oregon.gov/das/HR/Pages/PAF.aspx.

The 12-month cycle consists of four quarters. The first quarterly check-in does not necessarily start at the beginning of a calendar year or fiscal year.

OBSERVE:
Each three-month quarter is the time for managers to observe employee performance.

DISCUSS and DOCUMENT:
Managers have the month following each three-month quarter to meet with each employee to discuss the quarter's performance and document that discussion in Workday.



DAS DEPARTMENT OF ADMINISTRATIVE SERVICES CHIEF HUMAN RESOURCES OFFICE

YEARLY PLANNING CHECK-IN		
	STEPS	**NOTES**
☐	1. Manager reviews the position description (PD) for each employee and makes any updates if needed.	*The review should be focused on these two core sections: • **Program and Position Information**: This section contains a description of the program the position is a part of, how the position contributes to the purpose of the agency, why the position exists and its role in reaching program objectives. This section should describe the link between the employee's position and the agency and division's strategic goals and ensure those are reflected in the employee's performance expectations. • **Description of Duties**: This section contains the duties for the core job functions of the position (tied to the classification specifications) and are the minimum standards used to measure the employee's performance. Refer to the *"Editing Position Description & Additional Information"* Workday job aid.
☐	2. Manager reviews the employee's performance expectations and goals from the previous year.	The manager will look at the previous year's performance expectations and goals and will update those as needed for the upcoming 12-month cycle. If the manager is new to the position, they can run the Workday report called 'HCM Check-ins Overall'. This report will show all the check-ins previously completed.
☐	3. Manager documents the current year's performance expectations and goals in Workday.	The manager will create the "Yearly Planning Check-in" and add the performance expectations and goals in the description field. This will then notify the employee and allow them to review the performance expectations and goals. Refer to the *"Check-In"* Workday job aid.

YEARLY PLANNING CHECK-IN		
	STEPS	**NOTES**
☐	4. Manager and employee meet.	The manager and employee meet to discuss any changes to the PD, the performance expectations, and identify/agree on developmental or performance goals** for the year. This can be done in a meeting or via email. If the manager or employee is new to the position, it is recommended the manager meet with the employee to agree upon the performance expectations and goals for the year. **Note**: this initial meeting will not count as a quarterly check-in.
☐	5. Manager will update the "Yearly Planning Check-in", if needed.	After the manager and employee discuss and finalize the items in Step 4, the manager may need to update the "Yearly Planning Check-in".

* If the duties are changing substantially or this is a new position, the manager will need to work with their HR department to make those changes.

**Developmental or performance goals:

- Performance goal setting looks at the performance expectations that are a core function of the position.
- Developmental goal setting looks at performance that is *beyond* the regular and routine job duties, but they are still within the scope of the employee's classification.
- *If an employee is not meeting any of the performance expectations, the manager should identify performance goals first and if the employee has any additional capacity, they can identify developmental goals.*

QUARTERLY FEEDBACK CHECK-INS		
	STEPS	**NOTES**
☐	1. Manager meets with the employee to review past quarter's performance.	Manager meets with the employee to review the last quarter. Not all the expectations and goals need to be covered at each quarterly meeting, just what the employee has been focused on during the last quarter. You will document what was discussed in the 'Shared Notes' field. To determine the manager's 12-month feedback cycle refer to Section 3 or 4 of this document.
☐	2. In Workday, the manager will create a new Check-in for each quarterly feedback check-in.	In Workday, make sure the 'Planned For' date is within the date range for each quarter the manager is documenting (refer to Section 3 or 4 of this document). Refer to the "Check-in" Workday job aid.

FINAL PERFORMANCE FEEDBACK CHECK-IN		
	STEPS	**NOTES**
☐	1. Manager meets with employee to do a final review of the year.	Manager meets with employee to do a final review of the year looking back at the performance expectations, performance goals (if needed), developmental goals, successes, and achievements.
☐	2. Manager enters the final outcomes for the year into a new Check-in within Workday.	This will be a final summary of the outcomes, successes, and achievements for the year. Refer to the "Check-in" Workday job aid.
☐	3. Manager starts the yearly planning process for next year's 12-month cycle.	Refer to the Yearly Planning information.

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DOCUMENT CHANGE LOG	
Document Change	**Date**
Added Agency Head Initial Training and Tasks section.	2/6/24
Added a four (4) month completion deadline for the Foundational training program to the New Supervisory Manager's Training and Tasks section.	4/1/24
Added sections to the titles.	4/1/24